CQ5 WCM User Guide

Day

CQ5 WCM User Guide

Copyright 1993-2009 Day Management AG

Contents

1. Introduction 1
1.1. Introduction 1
1.2. Purpose of this Document 1
1.3. Target Audience 1
2. Connecting to CQ WCM 2
3. Overview of the GUI Console 4
3.1. Navigating CQ WCM 4
3.1.1. Page Information 5
3.2. Managing Pages within CQ WCM 6
3.2.1. Creating a New Page 6
3.2.2. Editing a Page 8
3.2.3. Find & Replace 11
3.2.4. Moving or Renaming Page 12
3.2.5. Deleting a Page 13
3.2.6. Setting the Page Properties 14
3.3. Using Edit, Design, and Preview Modes 19
3.3.1. Edit Mode 20
3.3.2. Design Mode 20
3.3.3. Preview Mode 22
3.4. Using the Content Finder 23
3.4.1. Finding Images 23
3.4.2. Finding Documents 24
3.4.3. Finding your Flash resources 24
3.4.4. Finding Pages 24
3.4.5. Referencing Paragraphs from other Pages 25
3.4.6. Using the Full Repository View 25
3.4.7. Using Search 26
3.5. How To Publish Pages 27
3.5.1. Activating Content 27
3.5.2. Deactivating Content 28
3.5.3. Determining Page Publication Status 29
3.5.4. Locking Pages 29
3.5.5. Unlocking Pages 30
3.5.6. Using Preview Mode 31
3.6. How To Restore Pages 31
4. Default Components 33
4.1. Overview of components 33
4.2. Components available from the Sidekick (or Insert New Component) 37
4.2.1. General 37
4.2.2. Collaboration 53
4.2.3. Columns 56
4.2.4. Form 58
4.2.5. Other 74
4.3. Geometrixx Components Available in Design Mode 79
4.3.1. Delete Action 80
4.3.2. Download Action 80
4.3.3. Edit Metadata Action 81
4.3.4. Header 82
4.3.5. Inheritance Paragraph System (iparsys) 83
4.3.6. Logo 84
4.3.7. Paragraph System (parsys) 85
4.3.8. parbase 86
4.3.9. Product List 86
4.3.10. Toolbar 88
4.3.11. Topnav (Top navigation bar) 88

Copyright 1993-2009 Day Management AG

4.3.12. Trail (Breadcrumb) ... 89
5. Default Templates ... 91
5.1. Overview of templates ... 91
5.2. Content Page ... 91
5.3. Redirect ... 93
6. Digital Asset Management ... 94
6.1. CQ DAM fully integrated in CQ WCM ... 94
6.2. Managing the individual assets ... 95
6.2.1. Upload File ... 96
6.2.2. Create Folder ... 96
6.2.3. Delete ... 96
6.2.4. Edit the metadata for an Asset ... 97
6.2.5. Copy ... 98
6.2.6. Paste ... 98
6.2.7. Move (or Rename) ... 98
6.2.8. Activate ... 100
6.2.9. Deactivate ... 100
6.3. Applying Workflows to Digital Assets ... 100
6.4. How to upload a Digital Asset using WebDAV ... 101
6.5. Finding Assets with the Asset Share ... 103
7. User Administration and Security ... 106
7.1. A quick overview of Authentication and Authorization ... 106
7.1.1. Authentication ... 106
7.1.2. Authorization ... 106
7.2. Authorization for CQ WCM - The Concepts ... 107
7.2.1. Users ... 107
7.2.2. Groups ... 107
7.2.3. Default Users and Groups ... 107
7.2.4. Permissions ... 109
7.2.5. Privileges ... 110
7.2.6. Replication Privilege ... 111
7.2.7. Impersonating another User ... 111
7.2.8. Best Practices ... 111
7.3. Configuring the Users and Groups ... 112
7.3.1. Accessing User Administration with the Security Console ... 112
7.3.2. Filtering Users and Groups ... 114
7.3.3. Hiding Users and Groups ... 114
7.3.4. Creating Users and Groups ... 115
7.3.5. Deleting Users and Groups ... 116
7.3.6. Modifying User and Group Properties ... 116
7.3.7. Changing a User Password ... 116
7.3.8. Groups - adding a User or Group to a Group ... 117
7.3.9. Members - adding Users or Groups to a Group ... 117
7.3.10. Setting Page Permissions ... 118
7.3.11. Setting Replication Privileges ... 118
7.3.12. Setting Privileges ... 119
7.3.13. Impersonating Users ... 119
7.3.14. Setting User and Group Preferences ... 120
8. Working with Workflows ... 121
8.1. Authorization needed for working with Workflows ... 121
8.2. The Workflow Console ... 121
8.3. The types of Workflow Steps available ... 123
8.3.1. Participant Step ... 123
8.3.2. Process Step ... 124
8.3.3. Container Step ... 124
8.3.4. AND Split ... 125
8.3.5. OR Split ... 126
8.4. Creating a Workflow ... 127

Copyright 1993-2009 Day Management AG

8.4.1. Creating a new Workflow Model 127
8.4.2. Editing the Workflow 127
8.5. Using the Workflow 131
8.5.1. Starting the Workflow for an individual page 131
8.5.2. Taking actions on a Participant Step 133
8.5.3. Suspending, Resuming and Terminating a Workflow instance 135
8.5.4. Monitoring the Status of Workflow Instances 136
8.6. Using the Workflow Launcher for Node Modifications 137
8.6.1. Adding a Launcher relationship 137
8.6.2. Removing a Launcher relationship 138
9. Tag Administration 139
9.1. Some basic facts about tagging in CQ 139
9.2. Top Ten Reasons to use Tagging 139
9.3. Tag Clouds 140
9.4. How to Manage Tags in CQ WCM 140
9.4.1. Using Sidekick to access and assign Tags 140
9.4.2. The Tag Administration Console 141
9.4.3. Searching for Tags 143
10. Personalization 146
10.1. What is Personalization? 146
10.2. How and when can Personalization be used? 146
10.3. Strengths of Personalization 147
10.4. Points to consider 147
10.5. Personalization and Access 148
10.6. Components available for Personalization 148
10.7. Personalization and Social Collaboration 149
11. Social Collaboration in CQ WCM 150
11.1. Blogs 150
11.1.1. How to Blog with CQ 150
11.2. Calendars 155
11.2.1. How to Use the Calendar with CQ WCM 156
11.3. Social Identity Management 162
11.3.1. Managing the Social Collaboration Profiles 162
11.4. Moderating Social Collaboration sites 165
12. Extending CQ documentation and Online Help 166
12.1. How to extend the documentation and online help 166
12.1.1. To extend the online help delivered with CQ 166
13. Multi Site Manager 169
13.1. Typical Use Cases for the Multi Site Manager 169
13.1.1. Multinational Site 169
13.1.2. Multilingual Site 169
13.1.3. Multinational Multilingual Site 170
13.2. Managing Different Language Versions of a Website 170
13.3. Managing the Translation of your Language Branches 172
13.4. Managing Blueprints and Live Copies 174
13.4.1. Creating a Live Copy 174
13.4.2. Configuring Synchronization Actions between a Blueprint and its Live Copy 183
13.4.3. Rolling out Changes on the Blueprint to the Live Copy 187
13.4.4. Live Copy status at Page and at Paragraph level 189
13.4.5. Managing Blueprints and Live Copies 194
13.4.6. Moving Blueprint and/or Live Copy pages 196
14. Tools 197
14.1. Bulk Editor 197
14.1.1. Example Use Case for the Bulk Editor 198
14.1.2. How to Use the Bulk Editor 199
14.2. Feed Importer 202
14.3. Offline Importer 202

Copyright 1993-2009 Day Management AG

14.3.1. How to import documents generated offline 202
14.4. External Link Checker 203
14.4.1. How to validate external links 203
14.5. Newsletter 204
14.5.1. How to Use the Newsletter Functionality 204
14.6. Security 207
14.6.1. How to configure automatic emails for account activities 207
14.7. Replication 208
14.7.1. Replicating from Author to Publish 209
14.7.2. Replicating from Publish to Author 209
14.7.3. How to configure your Replication Agents 209
14.7.4. Replication Agents - Configuration Parameters 214
14.7.5. How to monitor your Replication Agents 216
14.7.6. How to activate a complete section (tree) of your website 218
A. Keyboard Shortcuts 220
B. Security Checklist 221
B.1. Change Default Passwords 221
B.1.1. Changing the CQ admin password 221
B.1.2. Changing the admin password for CQSE 223
B.1.3. Changing the admin password for the Apache Felix Web Management Console 224
C. Copyright, Licenses and Formatting Conventions 225
C.1. Formatting Conventions 225

Copyright 1993-2009 Day Management AG

1 Introduction

1.1 Introduction

CQ WCM has been designed to provide an environment where business users can easily create and publish web content. You can share information quickly and efficiently within an easy to use environment, thus empowering you to provide high quality web content.

CQ WCM provides an intuitive GUI for entering and managing your web content. Workflows can be defined to apply your business processes to this content. High performance search mechanisms, together with an integrated tagging facility help you to find your content easily.

Consoles are provided for the task of administrating CQ WCM. Again intuitive design and a clear interface simplify these tasks, giving you full (and in nearly all cases) instantaneous control.

1.2 Purpose of this Document

To explain how to use CQ WCM, including:

- authoring content with the GUI
- an overview of all components and templates included within the standard installation of CQ WCM
- setting up and using Workflows
- CQ WCM administration
- managing your Digital Assets from within CQ WCM
- using Tags within CQ WCM

1.3 Target Audience

- Basic Users who will be authoring content (particularly Overview of the GUI Console and Default Components)
- Power Users who will be performing administration tasks, in addition to authoring content.

Copyright 1993-2009 Day Management AG

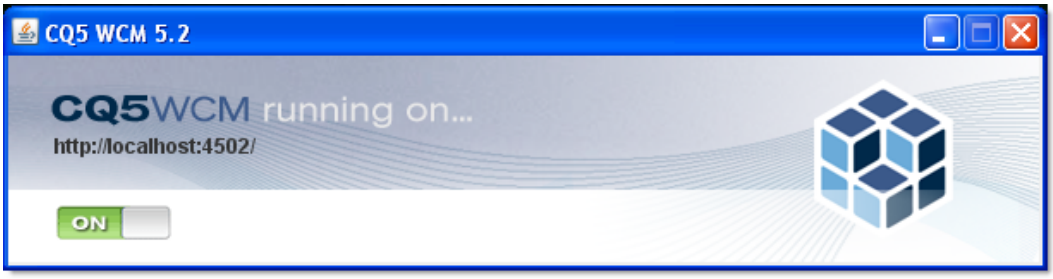
2 Connecting to CQ WCM

Once CQ WCM has been started, you connect using your web browser. (To start CQ WCM, see the section called “Starting CQ WCM”.)

1. To connect to CQ WCM you can either:

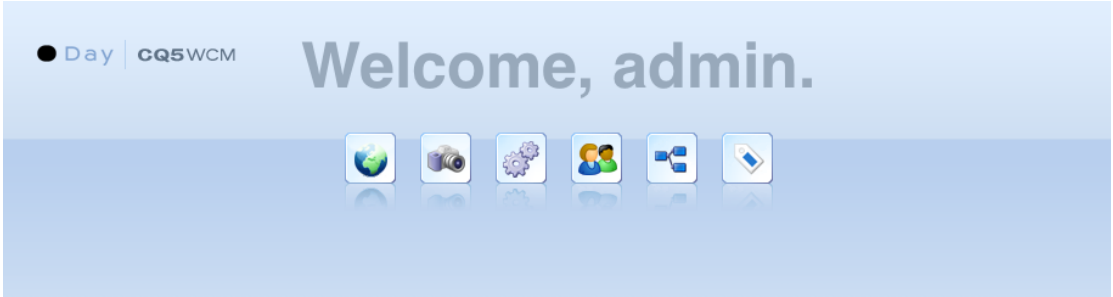
   a. Navigate to your CQ WCM instance using the URL supplied to you; for example `http://localhost:4502/`.

   b. If you have access to the CQ WCM Quickstart icon, click the URL link to open CQ in your browser:



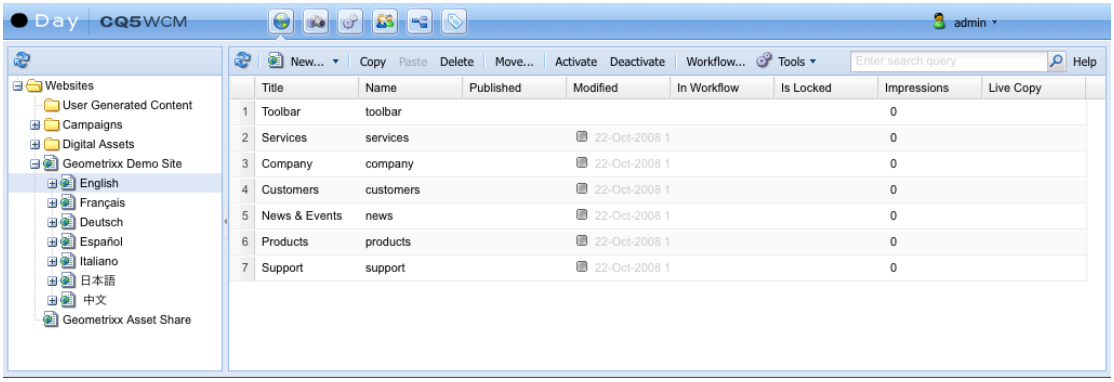
2. CQ WCM automatically opens the login page in your default web browser, for example, `http://localhost:4502/`. Enter your user name and password to log in and click **OK**.

3. By default, CQ WCM opens the welcome page:



4. Navigate to the appropriate window (see Chapter 3,) and start working in CQ WCM, for example wcm/siteadmin:

Copyright 1993-2009 Day Management AG



CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

3 Overview of the GUI Console

CQ WCM uses a web-based graphical user interface. You need a web browser to access CQ WCM. The graphical user interface is divided into six windows where you can access all of CQ WCM functionality.

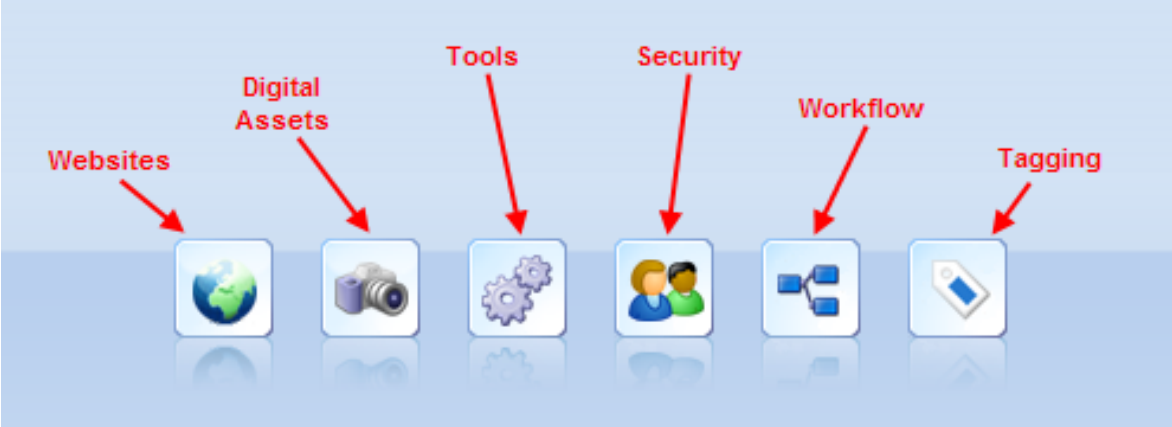


Table 3.1. CQ WCM windows

Window	Description
Websites	Access all the pages in your website; create, edit, and delete pages; start a workflow; activate and deactivate pages; restore pages; check external links; and access your user inbox.
Digital Assets	Manage digital assets.
Tools	Manage packages, designs, importers, workflow templates and scripts, replication agents and upgrades.
Security	Manage users and permissions.
Workflow	Manage pages that are in a workflow, create new workflow models using an easy to use graphical user interface.
Tagging	Manage your tags and taxonomies.

Throughout CQ WCM you can access the integrated version of this guide by using the
icon; as seen here in the Sidekick.

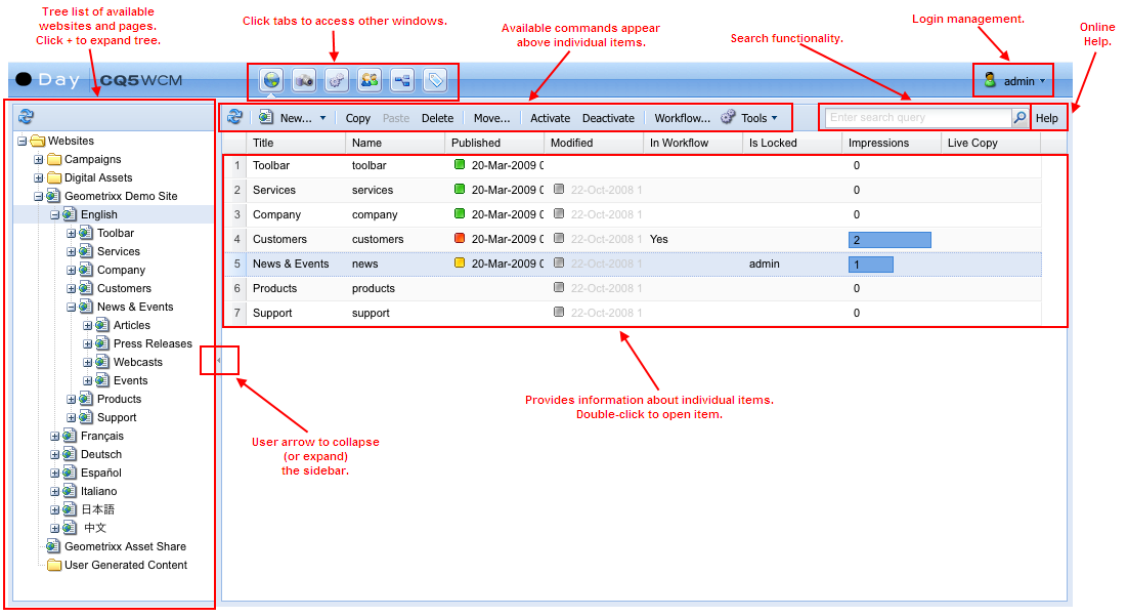
3.1 Navigating CQ WCM

Although each of the windows has different options, how you navigate CQ WCM is essentially the same:

- Double-click to open items.
- Access items from the tree list. Click x to expand and - to collapse those items.

Copyright 1993-2009 Day Management AG

- Click the tabs to access other windows.
- Available commands are above the items.
- Logging in and out is handled in the upper right corner.
- Collapse the sidebar by clicking the arrow.
- Search for pages using the search box.


Tree list of available websites and pages. Click + to expand tree.
Click tabs to access other windows.
Available commands appear above individual items.
Search functionality.
Login management.
Online Help.
Provides information about individual items. Double-click to open item.
User arrow to collapse (or expand) the sidebar.

3.1.1 Page Information

The site admin window provides important information about pages.

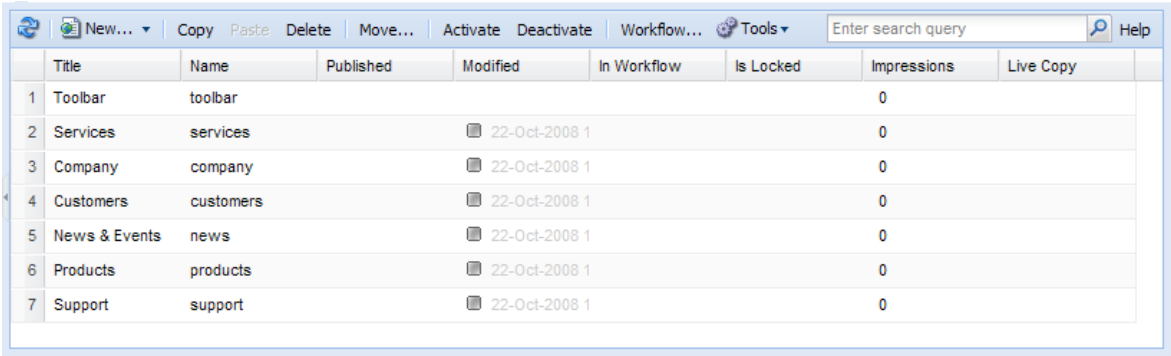

New... Copy Paste Delete Move... Activate Deactivate Workflow... Tools Enter search query Help
Title Name Published Modified In Workflow Is Locked Impressions Live Copy
1 Toolbar toolbar 0
2 Services services 22-Oct-2008 1 0
3 Company company 22-Oct-2008 1 0
4 Customers customers 22-Oct-2008 1 0
5 News & Events news 22-Oct-2008 1 0
6 Products products 22-Oct-2008 1 0
7 Support support 22-Oct-2008 1 0

Table 3.2. Page Information

Column	Description
Title	The title that appears on the page
Name	The name CQ5 refers to the page
Published	Indicates whether the page has been published and provides the publication date and time.
Modified	Indicates whether the page has been modified and provides the modification date and time.

Copyright 1993-2009 Day Management AG

Column	Description
	In order to save any modifications, you must activate the page.
In Workflow	Indicates whether the page is part of a workflow.
Is Locked	Indicates whether a page is locked.
Impressions	Shows the activity on a page in number of hits.
Live Copy	Indicates whether the page is a Live Copy.

3.2 Managing Pages within CQ WCM

This section describes how to create a page within CQ WCM and then create content on that page.

Important

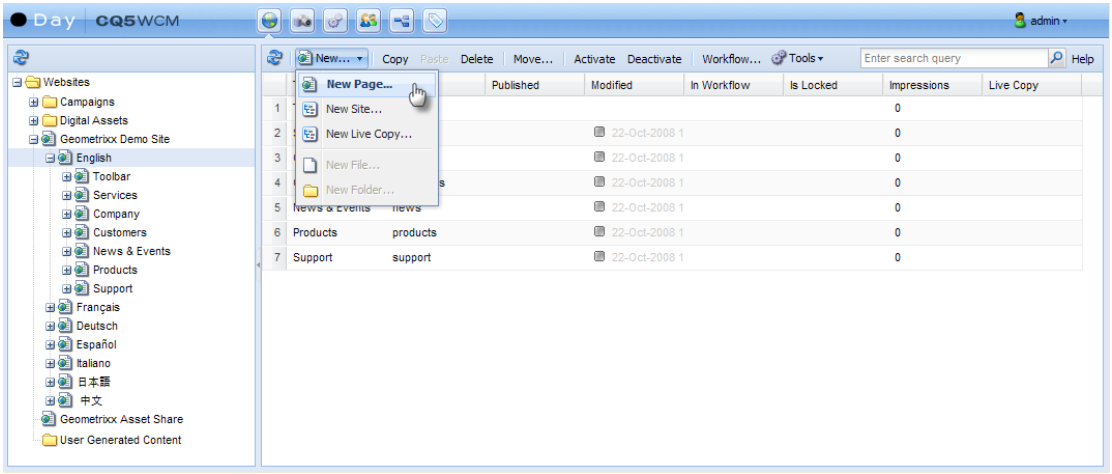
Your account needs the appropriate access rights to create or edit pages.

3.2.1 Creating a New Page

Unless all pages have been created for you in advance, before you can start creating content, you must create a page:

1. From the wcm/siteadmin window, select the level at which you want to create a new page.

   In the following example, you are creating a page under the level **`English`** - shown in the left pane; the right pane shows the existing pages at this level.



2. In the **`New...`** menu (click the arrow next to **`New...`**), select **`New Page...`**. The **`Create Page`** window opens.

   Note

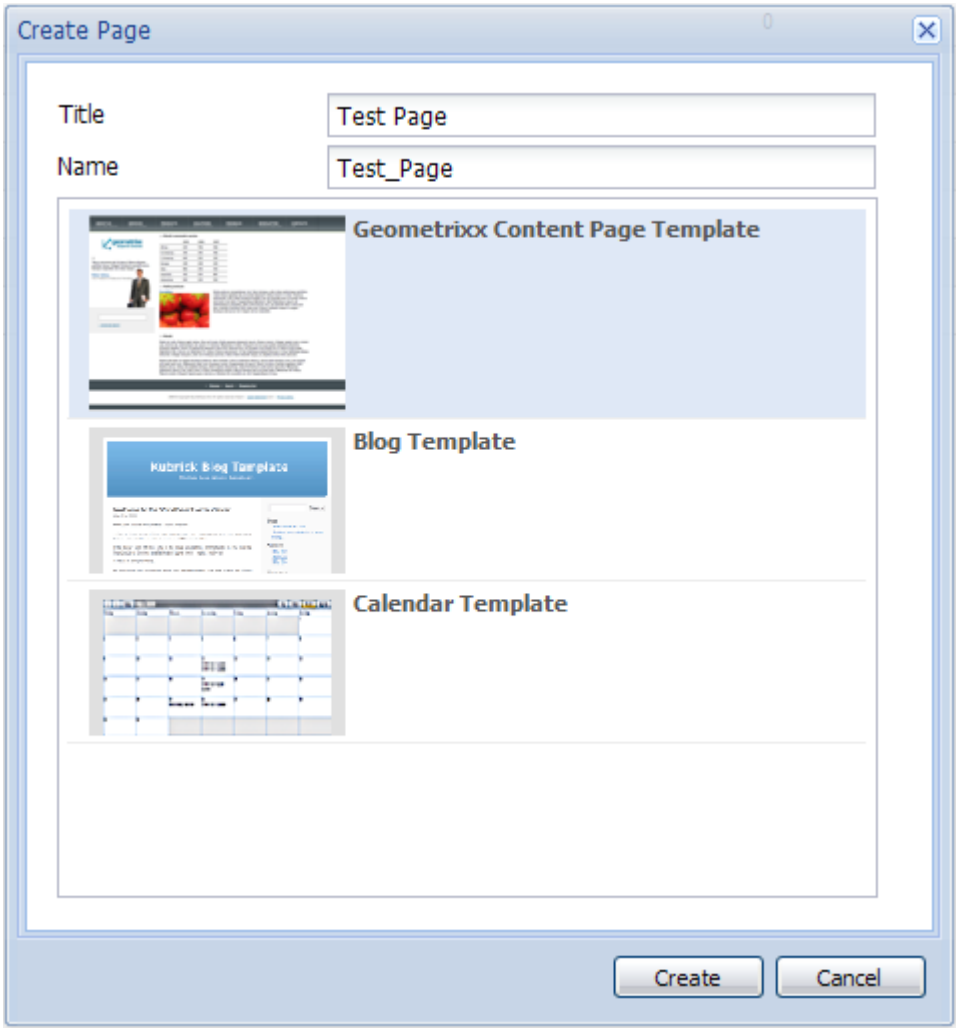
   Clicking **`New...`** itself also acts as a shortcut to the **`New Page...`** option.

3. In the **`Title`** field, select a title that is displayed to the user.

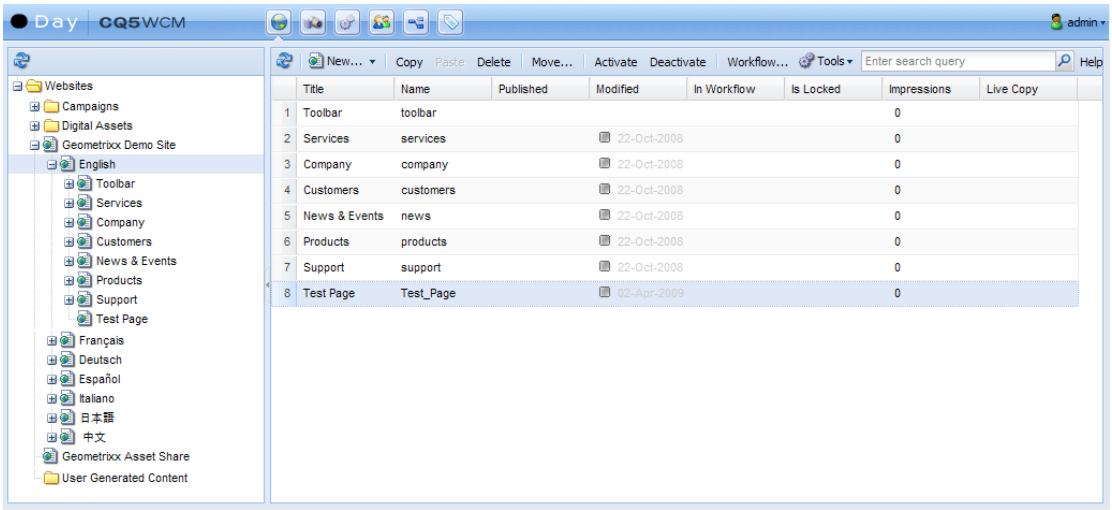
4. In the **`Name`** field, select a name that is used to create the URI.

5. Click the template you want to use to create the new page; for example, to determine the basic layout of a content page.

Copyright 1993-2009 Day Management AG



6. Click **`Create`** to create the page. You return to the wcm/siteadmin window where you can see an entry for the new page.



This provides information about the page (for example when it was last edited and by whom) which is updated as necessary.

Copyright 1993-2009 Day Management AG

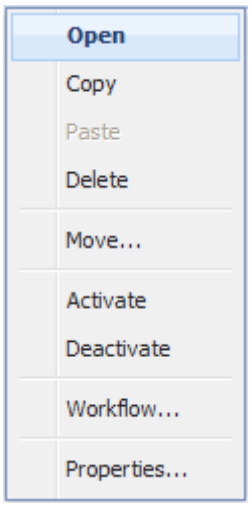
3.2.2 Editing a Page

After the page has been created, you can edit its content. When you first create a page, the page includes only the text and elements from the template. You add content by double-clicking or dragging and dropping components onto the page.

3.2.2.1 Opening a page

You can open the page to be edited by one of several methods:

- From wcm/siteadmin, you can **`double-click`** the page title to open it for editing.
- From wcm/siteadmin, you can **`right-click`** the page item, then select **`Open`** from the menu:



- After you have opened a page, you can navigate to other pages within the site to edit them by clicking hyperlinks.

3.2.2.2 Inserting a new paragraph

After you open the page, you can start to add content. You do this by adding *paragraphs* (also called *components*).

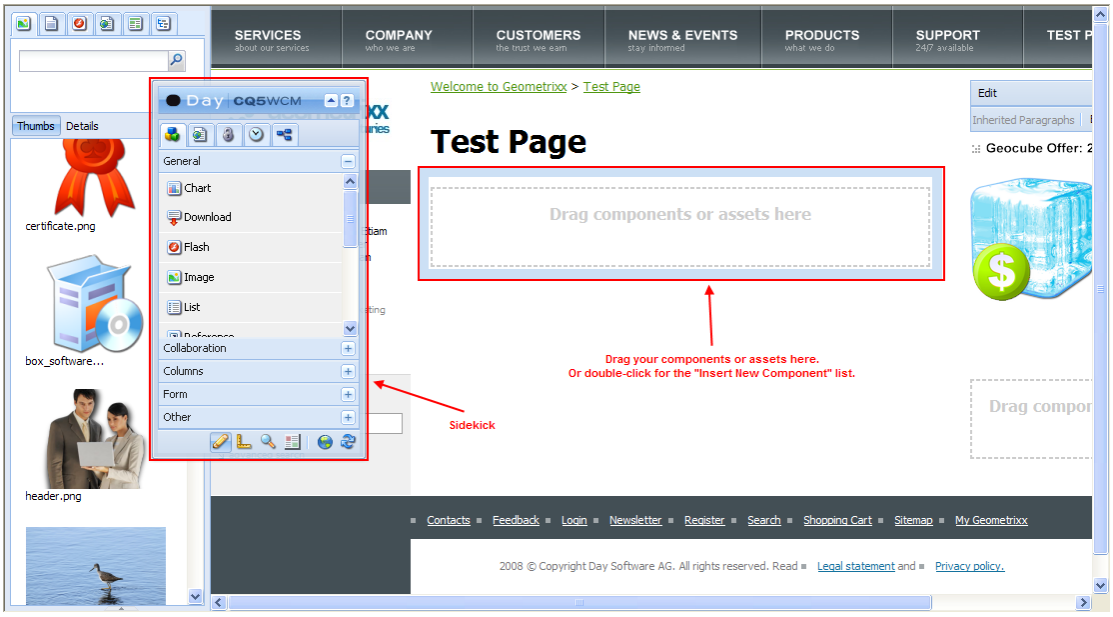
To insert a new paragraph:

1. Double-click the area labeled **`Drag components or assets here...`** or drag a component from the floating toolbar (called sidekick) to insert a new paragraph. This area appears wherever new content can be added, such as at the end of the list if other paragraphs exist or at the end of a column.

Note

If a paragraph already exists, you can **`right-click`** the paragraph and select **`Insert`**. This inserts the new paragraph before the existing one.

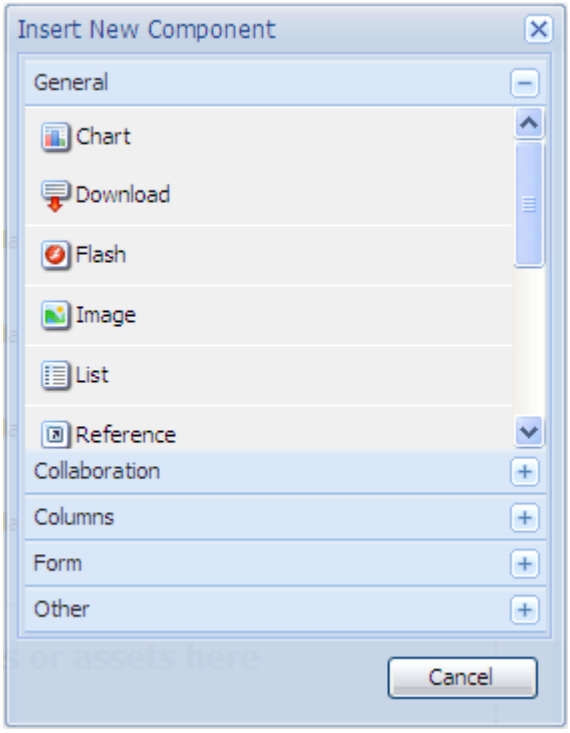
CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



2. After you select to insert a paragraph, you see a list of the available paragraph types.

Note

Depending on your production environment, these choices may differ. For complete details on components, see Default Components.



3. **`Click`** the component that you want. A window opens that allows you to configure your paragraph and add content.

3.2.2.3 Editing a paragraph

To edit an existing paragraph, do one of the following:

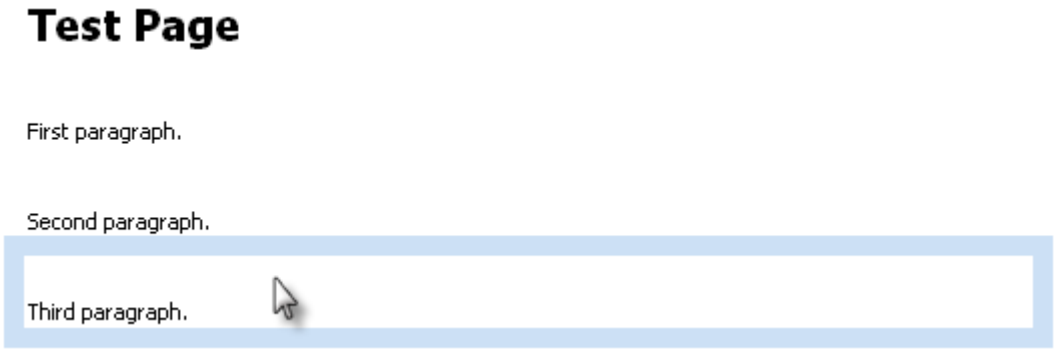
Copyright 1993-2009 Day Management AG

- **`Double-click`** the paragraph to open it. You see the same window as when you created the paragraph with the existing content. Make your changes and click **`OK`**.
- **`Right-click`** the paragraph and click **`Edit`**.

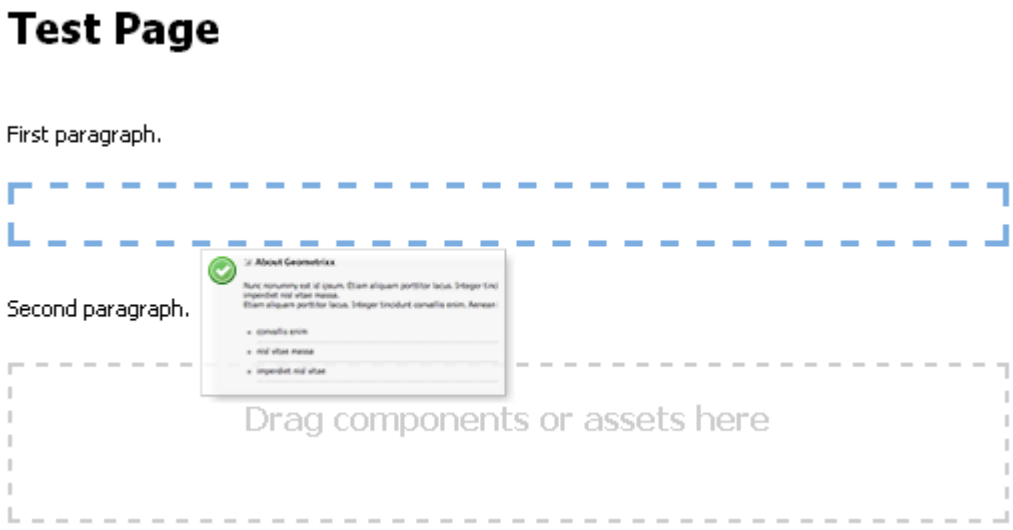
3.2.2.4 Moving a paragraph

To move a paragraph:

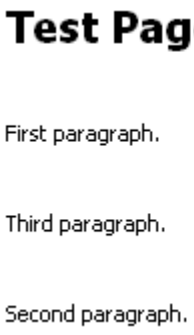
1. Click the paragraph you want to move. CQ WCM highlights the paragraph.



2. Drag the paragraph to the new location - CQ WCM indicates where paragraphs can be moved to with a green checkmark. Drop it in your desired location:



3. Your paragraph is moved.

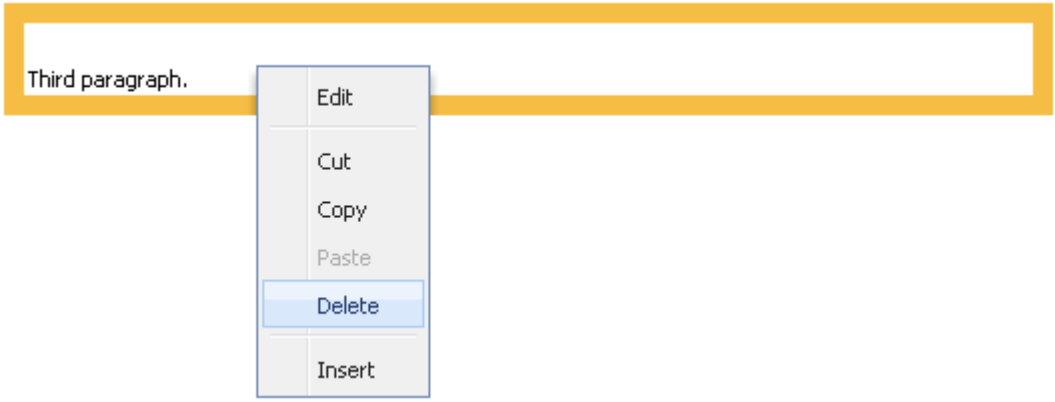


3.2.2.5 Deleting a paragraph

To delete a paragraph:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

1. Select the paragraph and **`right-click`**.



2. Select **`Delete`** from the menu. CQ WCM requests confirmation that you want to delete the paragraph as this action cannot be undone.

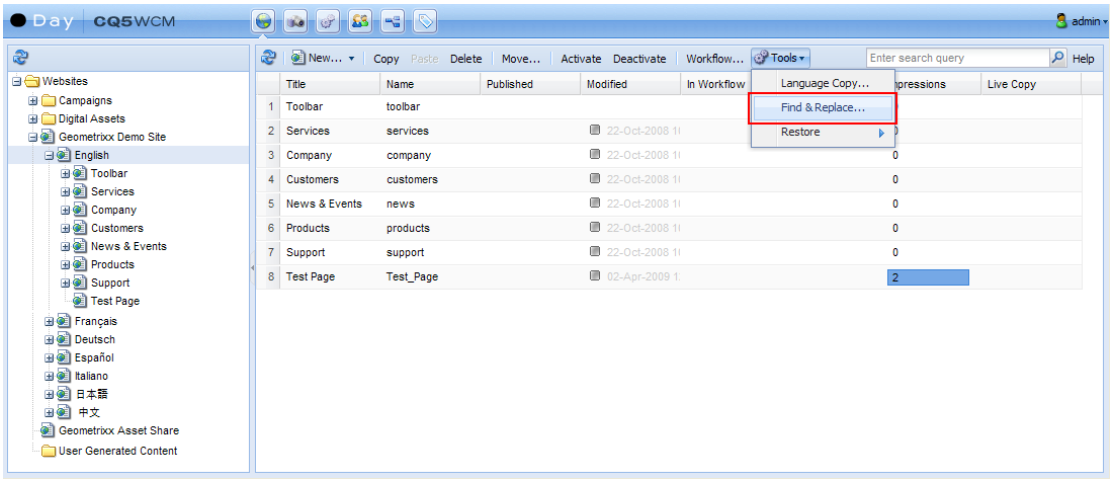
3. Click **`OK`**.

3.2.3 Find & Replace

A **`Find & Replace`** menu option allows you to search for, and replace multiple instances of a string, within a section of the website.

1. Select the root page, or folder, where you want the “Find and Replace” action to take place.

2. Select **`Tools`** then **`Find & Replace`**:

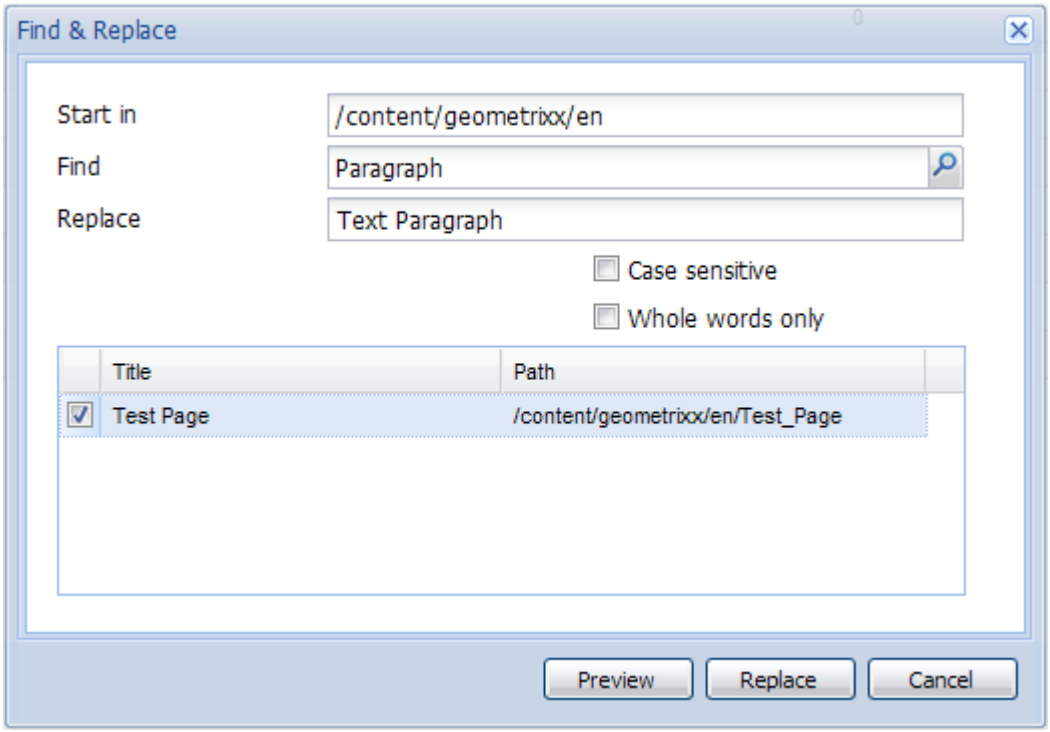


3. The **`Find & Replace`** dialog will:

   - confirm the root path where the find action should start
   - define the term to be found
   - define the term that should replace it
   - indicate whether the search should be case-sensitive
   - whether only whole words should be found (otherwise substrings will also be found)

   Clicking **`Preview`** will list where the term has been found. You can select / deselect specific instances to be replaced:

Copyright 1993-2009 Day Management AG



4. Click **`Replace`** to actually replace all instances. You will be asked to confirm the action.

Note

The default scope for the find and replace servlet covers the following properties:

- jcr:title
- jcr:description
- jcr:text
- text

This can be changed using the **`Apache Felix Web Management Console`** (for example, at `http://localhost:4502/system/console/configMgr`) for `com.day.cq.wcm.core.impl.servlets.FindReplaceServlet`.

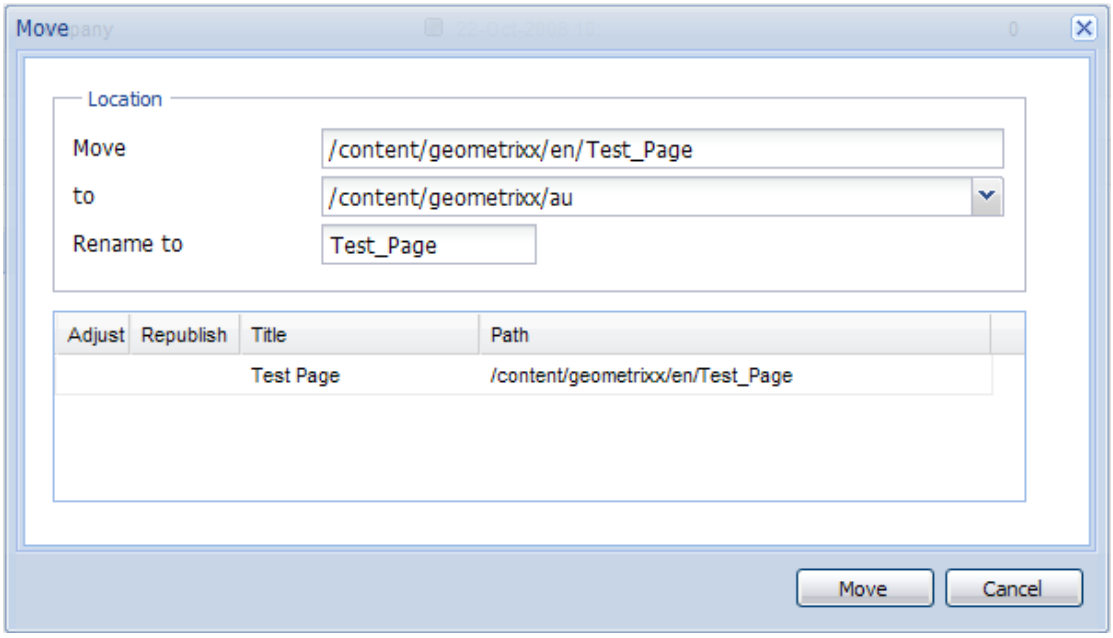
3.2.4 Moving or Renaming Page

The procedure to move or rename a page is the same. You do not need to do both: you can rename a page without moving it or vice versa.

To move or rename a page:

1. From the wcm/siteadmin window, click to select the page, then select **`Move...`**. (You can also select the page item, then **`right-click`** and select **`Move...`**.) The **`Move`** window opens where you can either specify a new location, a new name for the page, or both.

Copyright 1993-2009 Day Management AG



2. Fill in the following fields, as appropriate:

   Move
   Specify the page to be moved - this is usually filled in by default, depending on how and where you started the move action.

   to
   Use the sitemap (available via the drop-down menu

) to select the location where the page should be moved to. If you are only renaming the page, ignore this field.

   Rename to
   The current page label displays by default. Specify the new page label, if required.

3. Click **Move**. CQ WCM confirms that you want to move or rename the current page. Click **OK** to confirm.

3.2.5 Deleting a Page

1. You can delete a page from various locations:

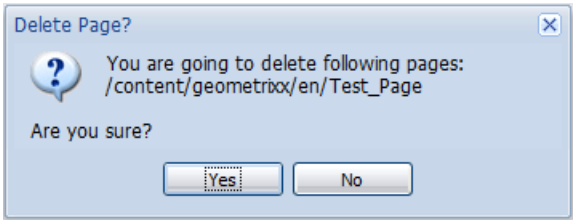
   - Within the wcm/siteadmin window, **click** to select the page, then **right-click** and select **Delete** from the resulting menu.
   - Within sidekick use the Page actions tab to select **Delete** - this deletes the page that is currently open

2. After you have selected to delete a page you must confirm the request - as the action cannot be undone.

Note

If the page has been published you can restore the latest (or a specific) version, but this may not have exactly the same content as your last version if further modifications had been made. See the section called “How To Restore Pages” for further details.

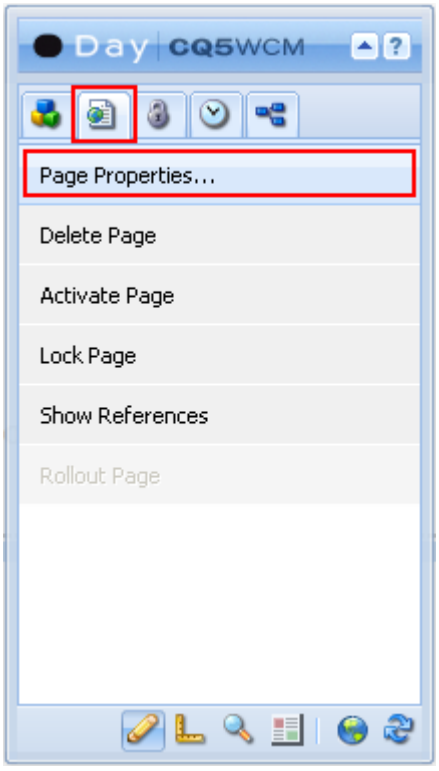
Copyright 1993-2009 Day Management AG



3.2.6 Setting the Page Properties

Page Properties define the various properties of the page, such as titles, when they appear on the website and others.

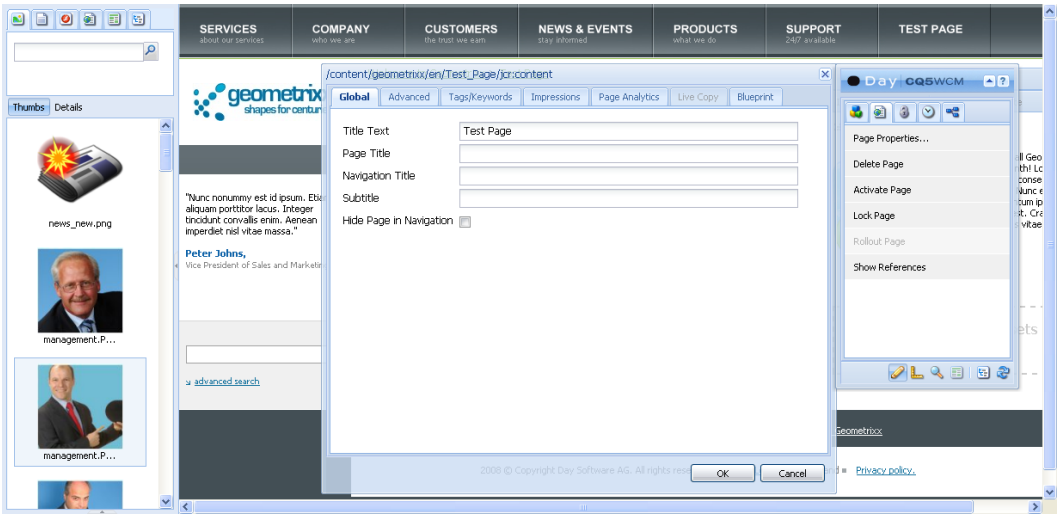
1. Open the page you want to edit.
2. In the sidekick, click the Page icon. Select **`Page Properties...`** from the list.



3. In the window that opens, you can modify the global, advanced, tags, impressions, and page analytics of a page:

   a. Global

Copyright 1993-2009 Day Management AG



Title Text
: The page title - as appears in the siteadmin list.

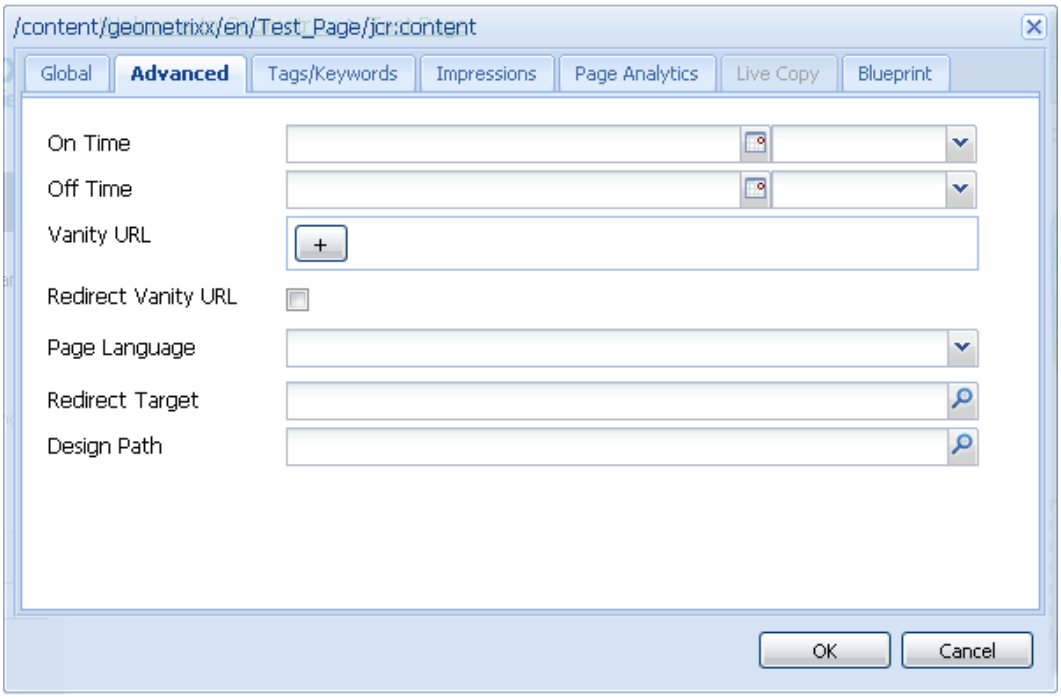
Page Title
: A title to be used on the page.

Navigation Title
: A title for the page for use within the navigation map. Often shorter than the full title.

Subtitle
: A subtitle for use on the page.

Hide Page in Navigation
: A toggle switch to indicate whether the page is shown or hidden in the page navigation.

b. Advanced



Copyright 1993-2009 Day Management AG

On Time
: The date and time at which the published page will be activated. When published this page will be kept dormant until the specified time. Leave these fields empty for pages you want to publish immediately (the normal scenario).

Off Time
: The time at which the published page will be deactivated. Again leave these fields empty for pages you want to publish immediately.

Vanity URL
: Allows you to enter a vanity URL for this page.

Redirect Vanity URL
: Indicates whether you want the page to use the vanity URL.

Page Language
: Defined language of the page.

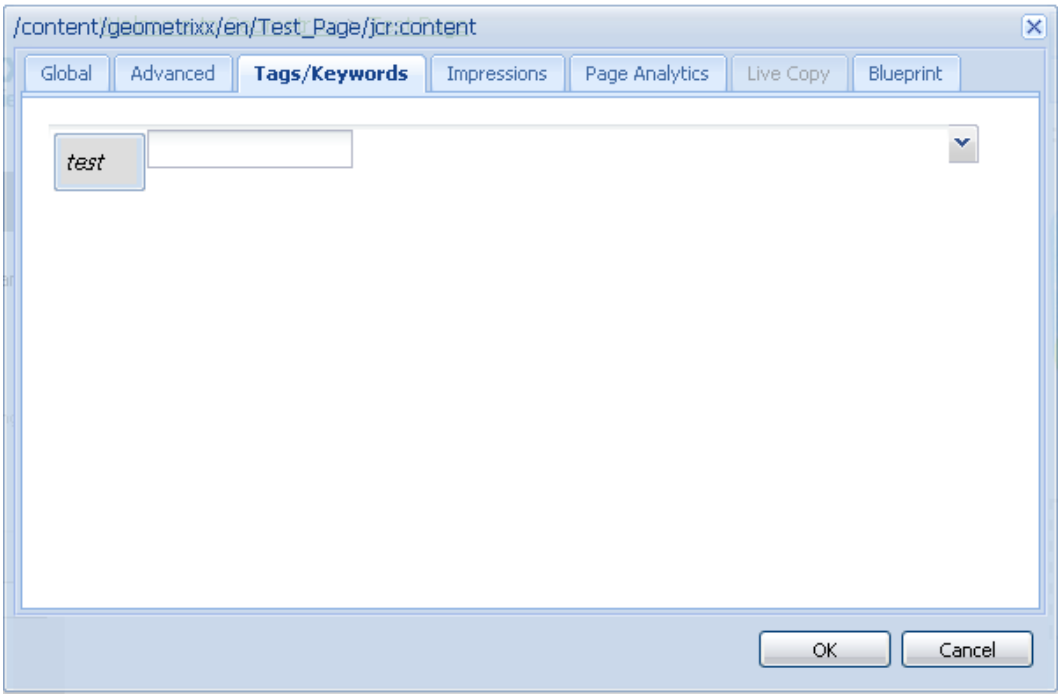
Redirect Target
: Target to which the page should be redirected.

Design Path
: Path of the page design.

c. Tags/Keywords

Here you can add, or remove tags from the page by updating the list in the selection box:

- A completely new tag can be entered by typing the name in an empty space in the selection box.
- With the drop-down functionality you can select from existing tags.
- An **x** appears when you mouse-over a tag entry in the selection box; this can be used to remove that tag for this page.

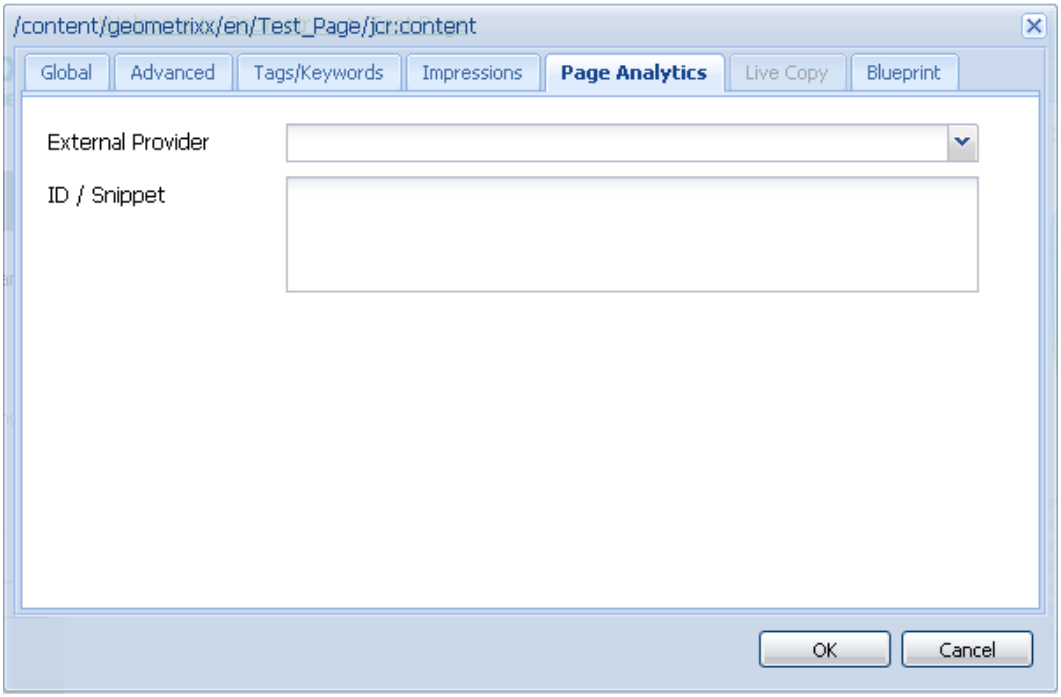


Copyright 1993-2009 Day Management AG

d. Impressions

This shows the activity on the page as in the impressions generated.

e. Page Analytics

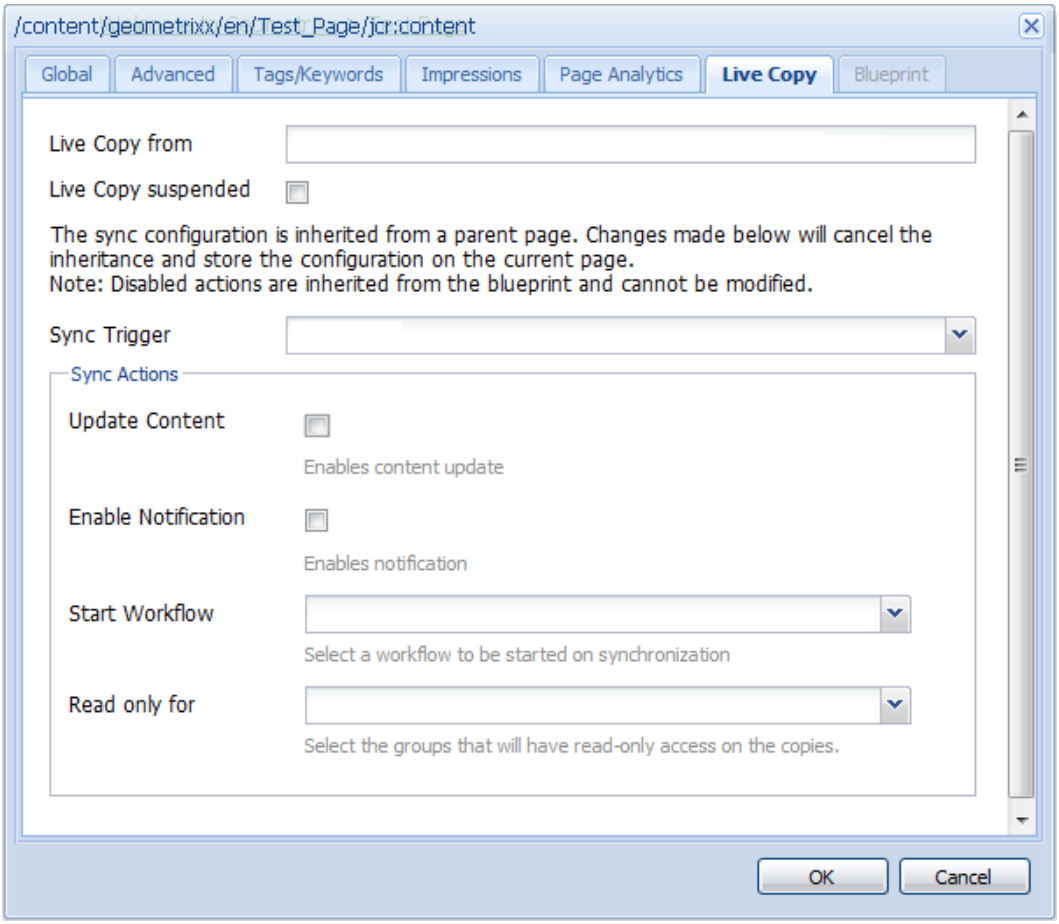


External Provider
: The provider who is generating the analytical statistics.

ID / Snippet
: The ID or code snippet to be included on the page.

f. Live Copy:

Copyright 1993-2009 Day Management AG



Live Copy From
Define the source path.

Live Copy suspended
Suspend the Live Copy.

Sync Trigger
Defines when the modifications on the Blueprint are propagated to the Live Copy.

Sync Actions

Update Content
Controls whether, or not, modifications to the Blueprint will be propagated.

Enable Notification
Activate to be notified when the modifications are propagated.

Start Workflow
Select the workflow to be started when the synchronisation actions are triggered.

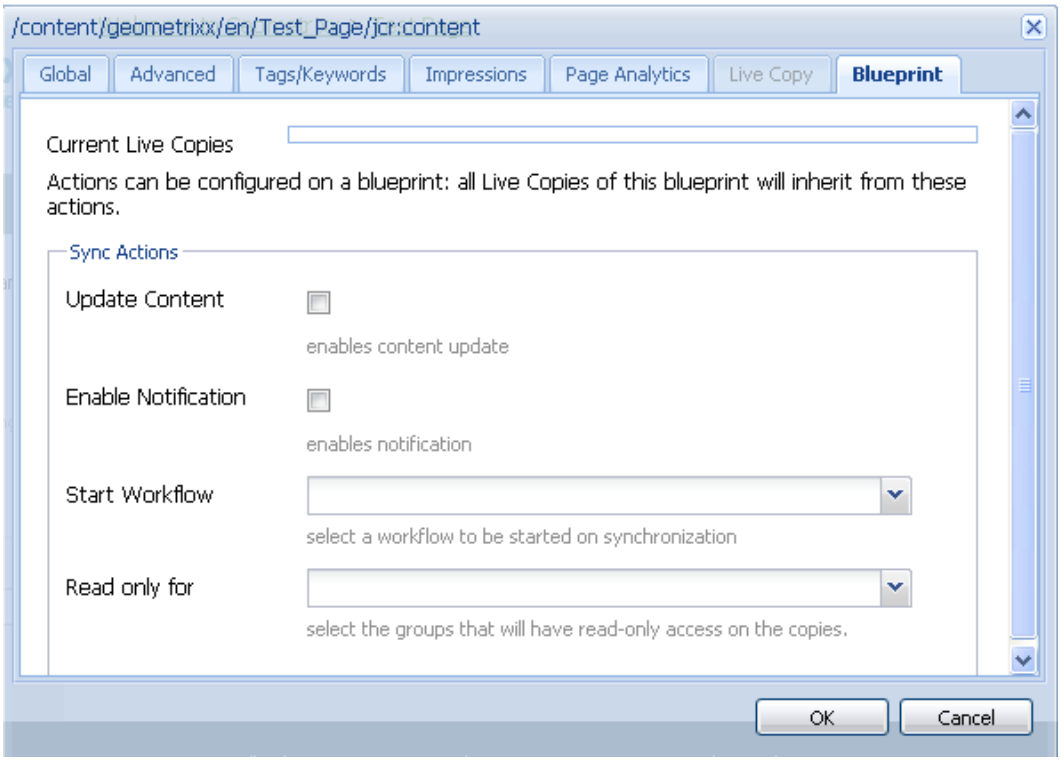
Read only for
Select the group that will have read-only access to the Live Copy.

Important

See Chapter 1, for full details.

g. Blueprint:

Copyright 1993-2009 Day Management AG



Current Live Copies
: Show the current live copies.

Sync Actions
: Actions defined for the blueprint:

Update Content
: Enables content update.

Enable Notification
: Enables notifications.

Start Workflow
: Select a workflow to be started upon synchronization.

Read only for
: Select the groups that will have read-only access to the copies.

Important

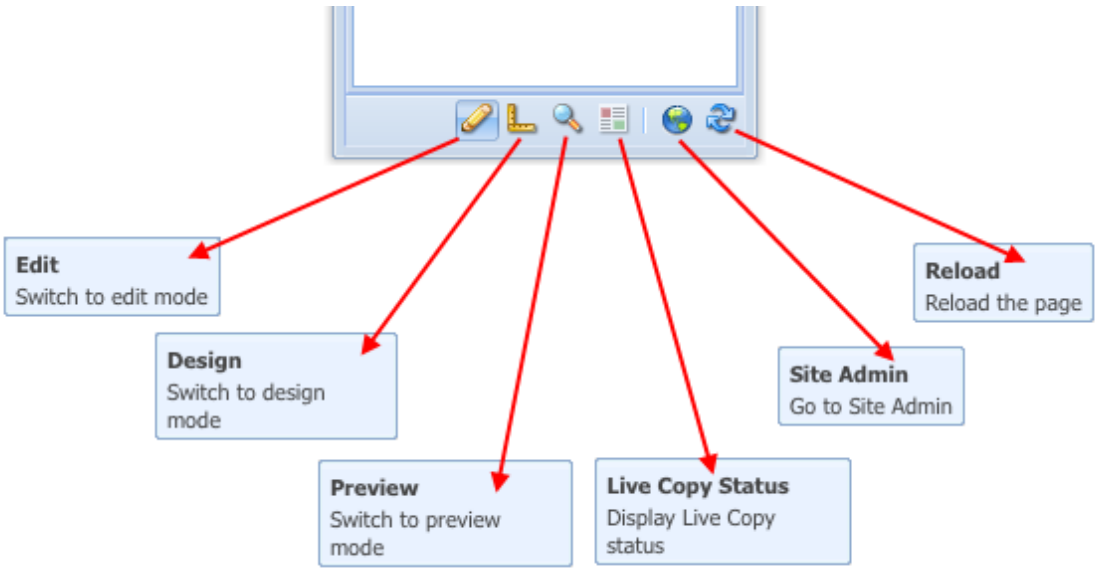
See Chapter 1, for full details.

4. Click **OK** to save the new properties.

3.3 Using Edit, Design, and Preview Modes

The row of icons at the bottom of the Sidekick are used to switch modes for working with the pages:

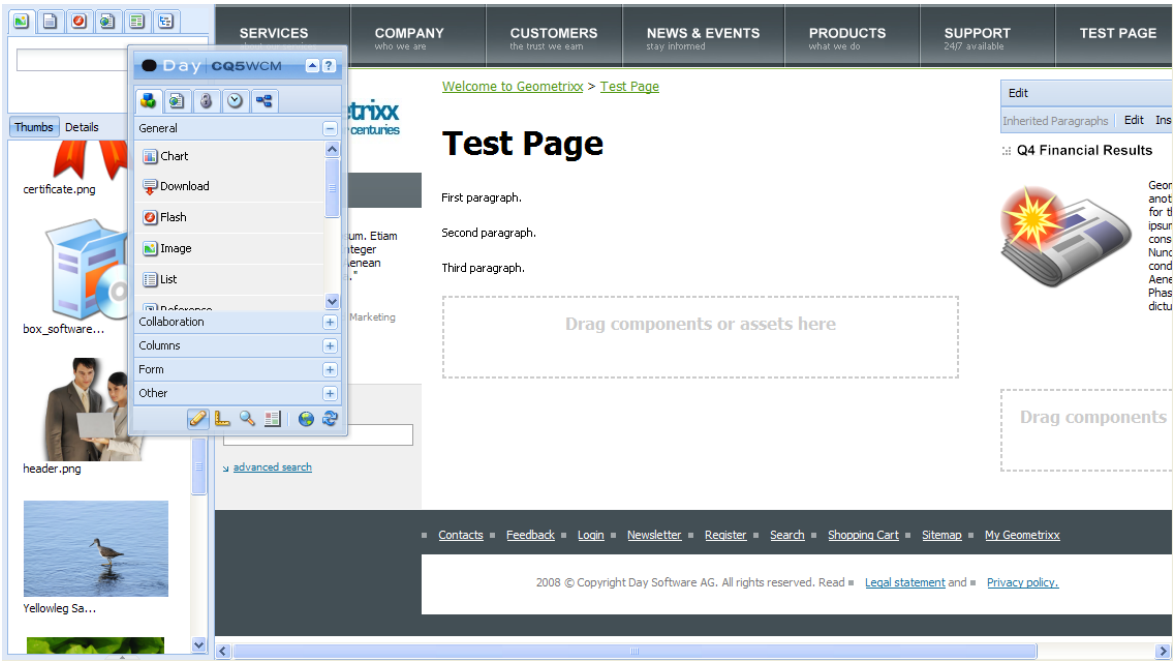
Copyright 1993-2009 Day Management AG



The Sidekick minimizes in certain modes - namely Design and Preview. By clicking on the arrow you can maximize the Sidekick and return to Edit Mode:

3.3.1 Edit Mode

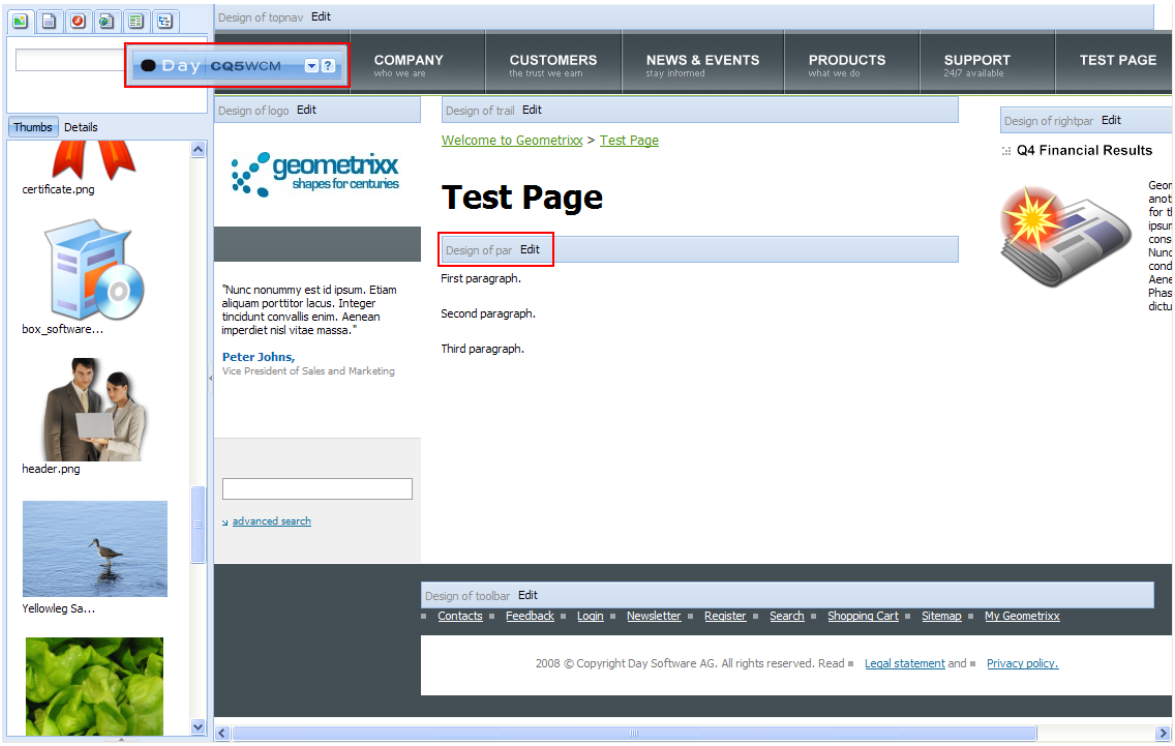
This is the default mode and allows you to edit the page, adding or deleting components and making other changes.



3.3.2 Design Mode

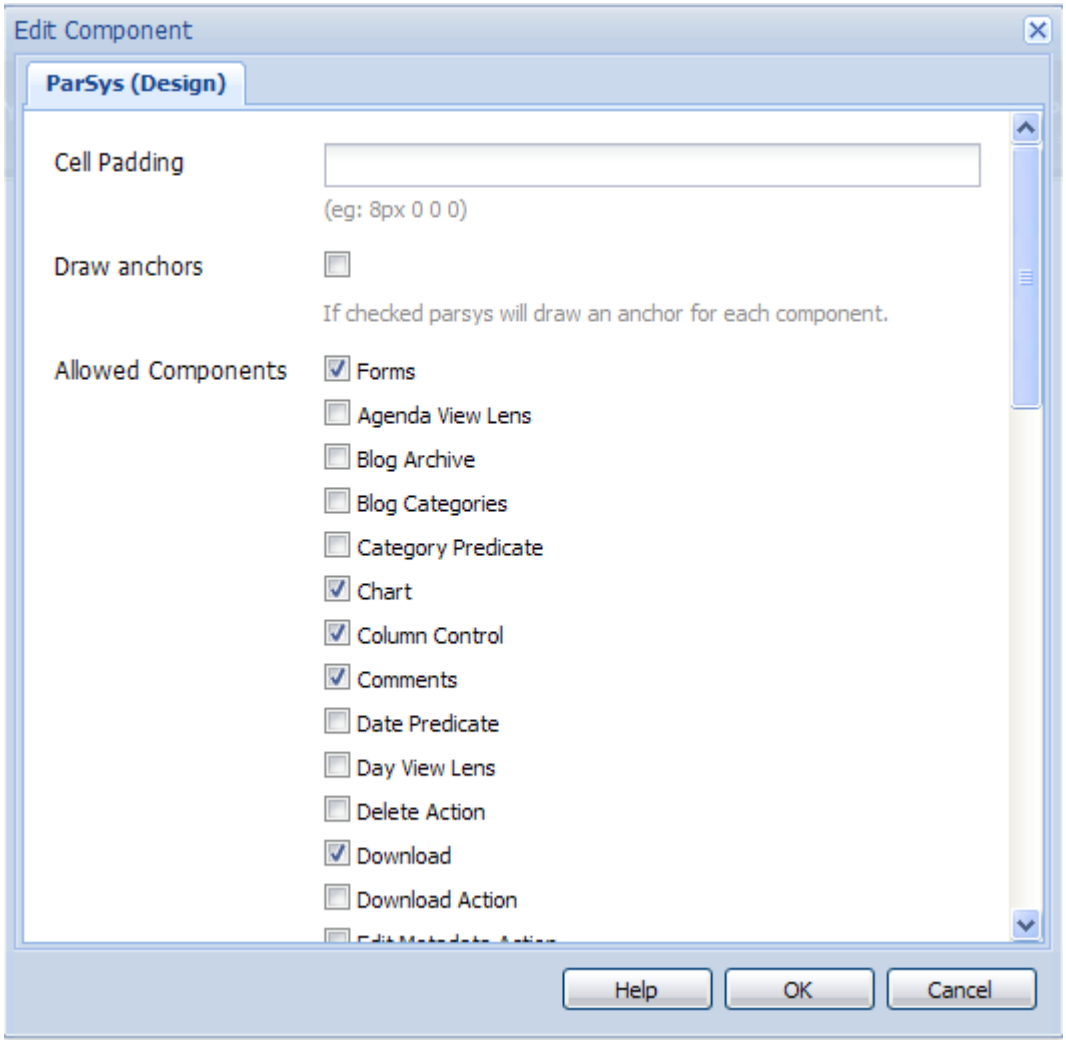
In this mode, the sidekick is minimized and you have the possibility to edit the design of the page:

Copyright 1993-2009 Day Management AG



For example, if you click **`Edit`** on the Paragraph system you can add, or remove what components are available:

Copyright 1993-2009 Day Management AG

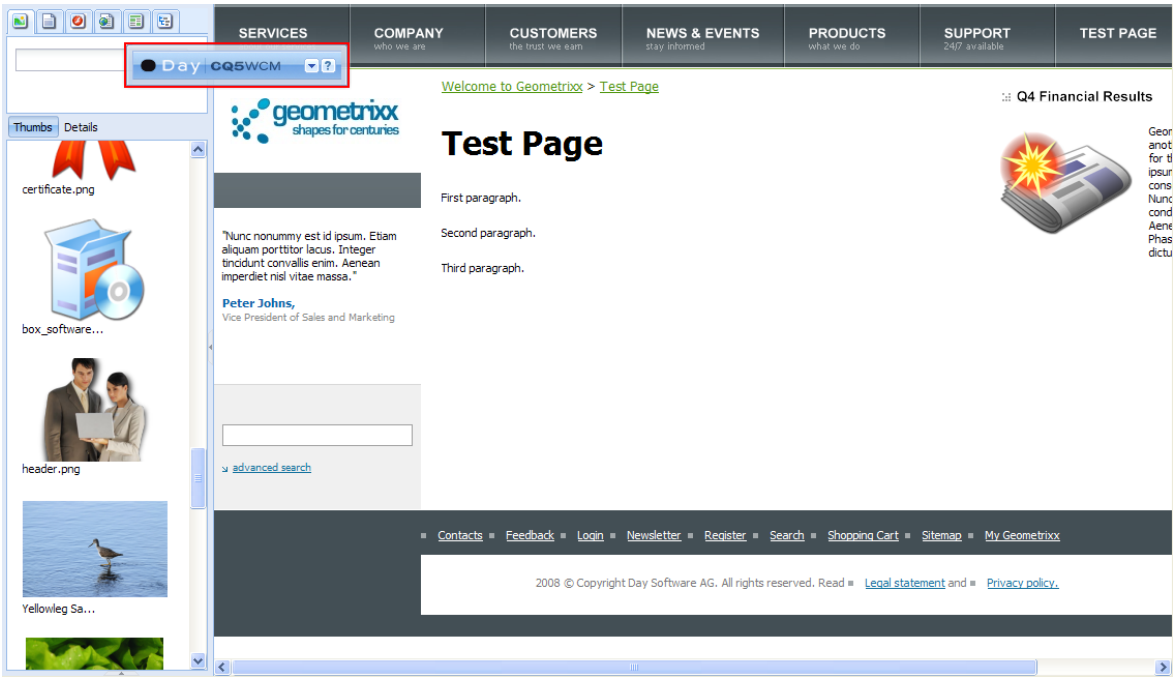


Click the arrow on the sidekick to return to Edit mode.

3.3.3 Preview Mode

This mode allows you to preview the page as if it were appearing on your website in its final form. Again the sidekick is minimized.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



As in Design mode, click the arrow on the sidekick to return to Edit Mode.

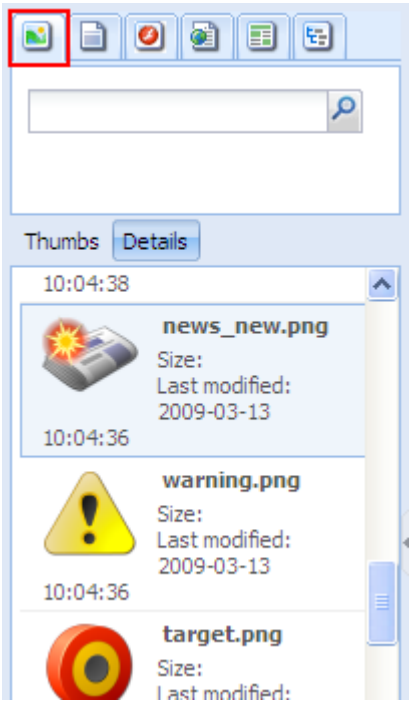
3.4 Using the Content Finder

The Content Finder is a quick and easy way to find content within the repository when editing a page.

3.4.1 Finding Images

This tab lists any images in the repository.

After you have created an Image paragraph on your page, you can drag an item and drop it into the paragraph.

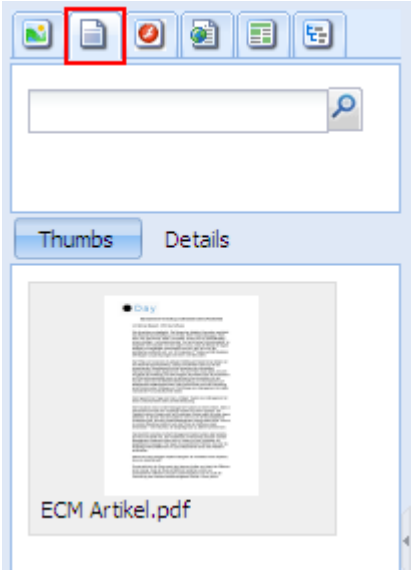


Copyright 1993-2009 Day Management AG

3.4.2 Finding Documents

This tab lists any documents in the repository.

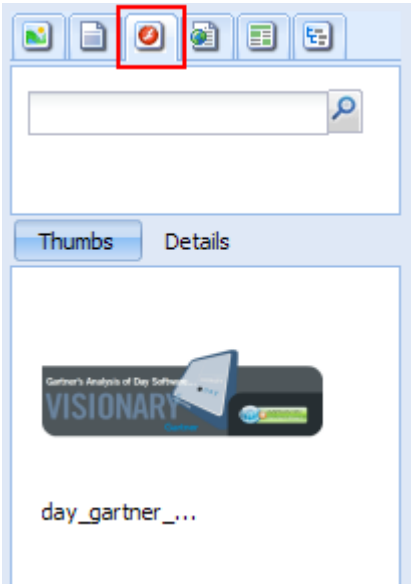
After you have created a Download paragraph on your page, you can drag an item and drop it into the paragraph.



3.4.3 Finding your Flash resources

This tab lists any Flash items in the repository.

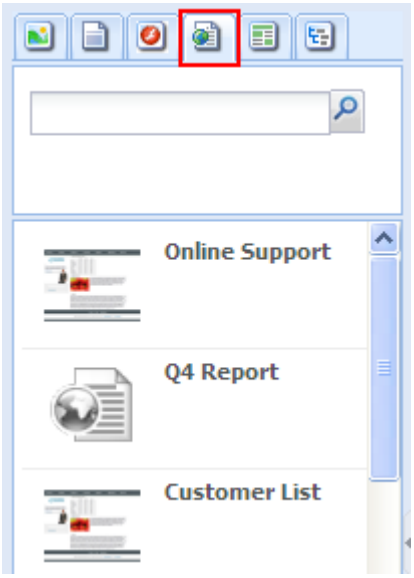
After you have created a Flash paragraph on your page, you can drag an item and drop it into the paragraph.



3.4.4 Finding Pages

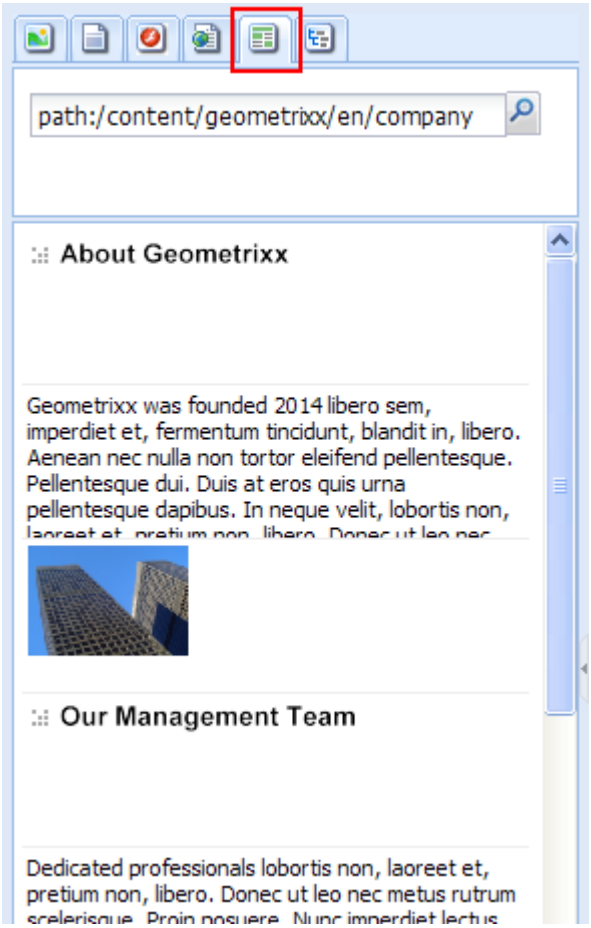
This tab shows all pages. **`Double-click`** any page to open it for editing.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



3.4.5 Referencing Paragraphs from other Pages

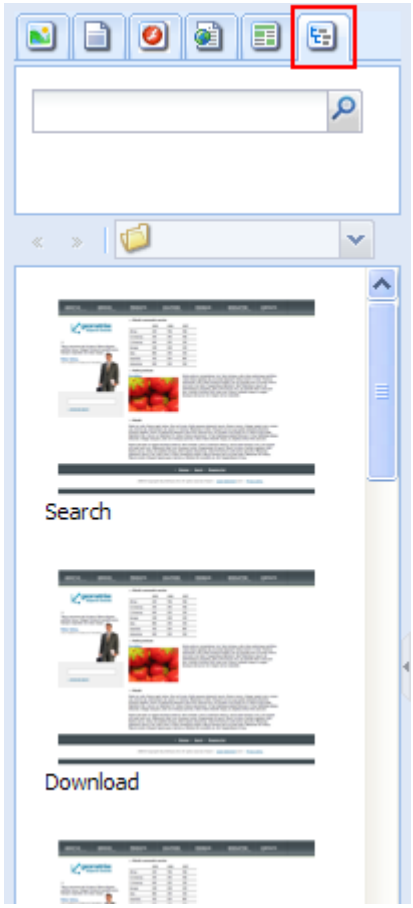
This tab allows you to search for another page. All paragraphs from that page will be listed. You can then drag a paragraph to your current page, this will create a reference to the original paragraph.


path:/content/geometrixx/en/company
About Geometrixx
Geometrixx was founded 2014 libero sem, imperdiet et, fermentum tincidunt, blandit in, libero. Aenean nec nulla non tortor eleifend pellentesque. Pellentesque dui. Duis at eros quis urna pellentesque dapibus. In neque velit, lobortis non,
Our Management Team
Dedicated professionals lobortis non, laoreet et, pretium non, libero. Donec ut leo nec metus rutrum

3.4.6 Using the Full Repository View

This tab shows all the resources in the repository.

Copyright 1993-2009 Day Management AG

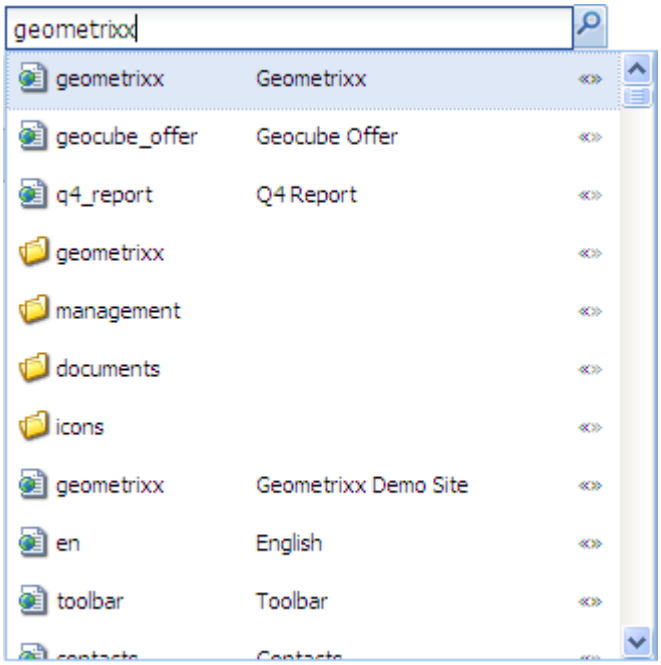


3.4.7 Using Search

Enter your required search pattern (a term or sub-string) in the search box and either hit **`Return`**, or click

.

Any tags and any resources that match the search pattern are listed:



Copyright 1993-2009 Day Management AG

3.5 How To Publish Pages

This section describes how to publish pages in CQ WCM. To publish a page, you activate its contents. Conversely, to remove a page from publication, you deactivate its contents.

When you are working on pages that you are modifying, you can lock the pages so other users cannot make changes or accidentally activate the content. In addition, you preview a page before publishing by selecting Preview Mode in the sidekick.

If you are a system administrator and need to test the publish environment, see How to install CQ5 author and publish instances.

3.5.1 Activating Content

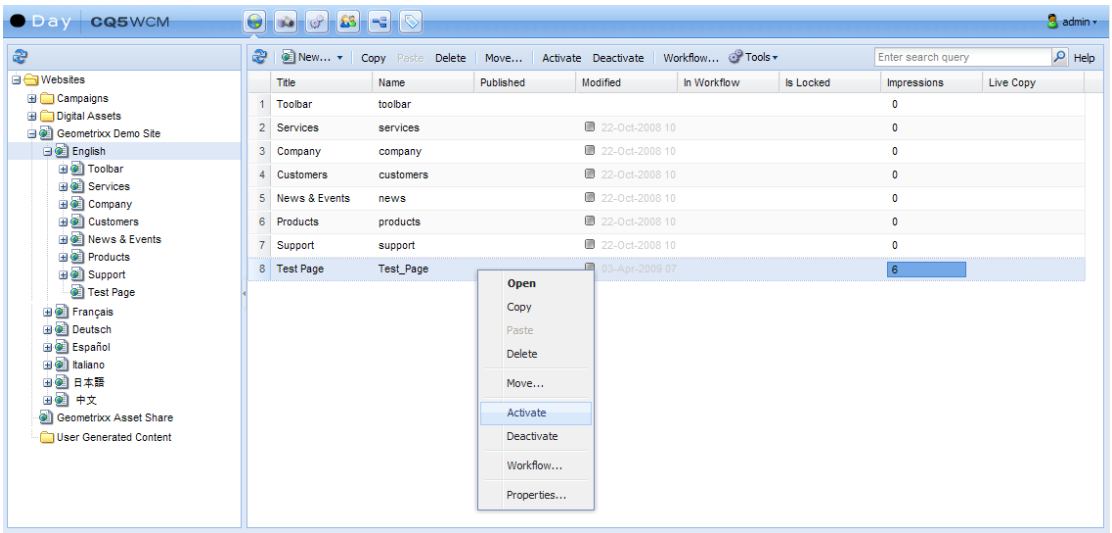
You activate pages in the wcm/siteadmin window. After you have opened a page and modified its contents, you return to the wcm/siteadmin window to activate the content of that page or of an entire tree of pages.

To activate page content:

1. In the siteadmin/wcm window, select the page that you want to activate.
2. Select **`Activate`**, either from the top menu, or the drop-down menu on the selected page item.

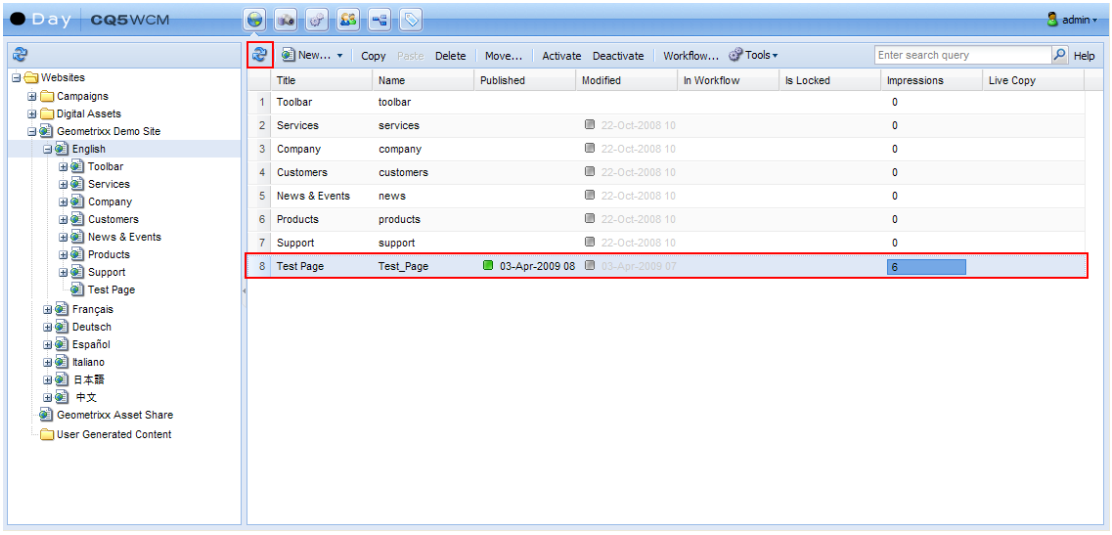
Note

To activate the content of the page and all its sub-pages use the Tools tab.



3. CQ WCM activates the selected content. To see that the page and its sub-pages (if selected) have been published, **refresh** the page. The published page or pages appears in the siteadmin/wcm window with information about who activated the content as well as date and time of activation.

Copyright 1993-2009 Day Management AG

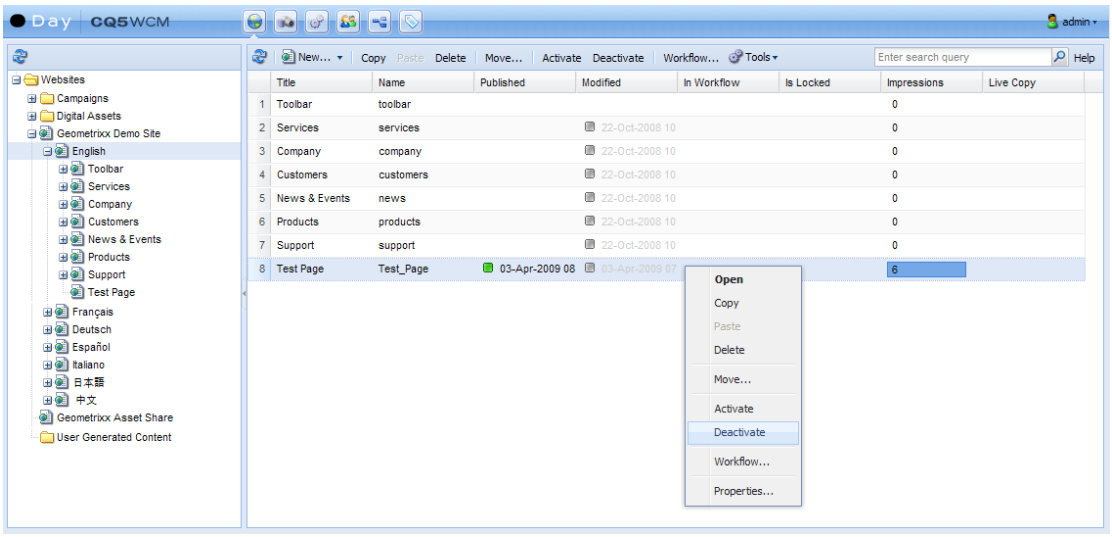


3.5.2 Deactivating Content

To remove a page from the publish environment, you deactivate the content.

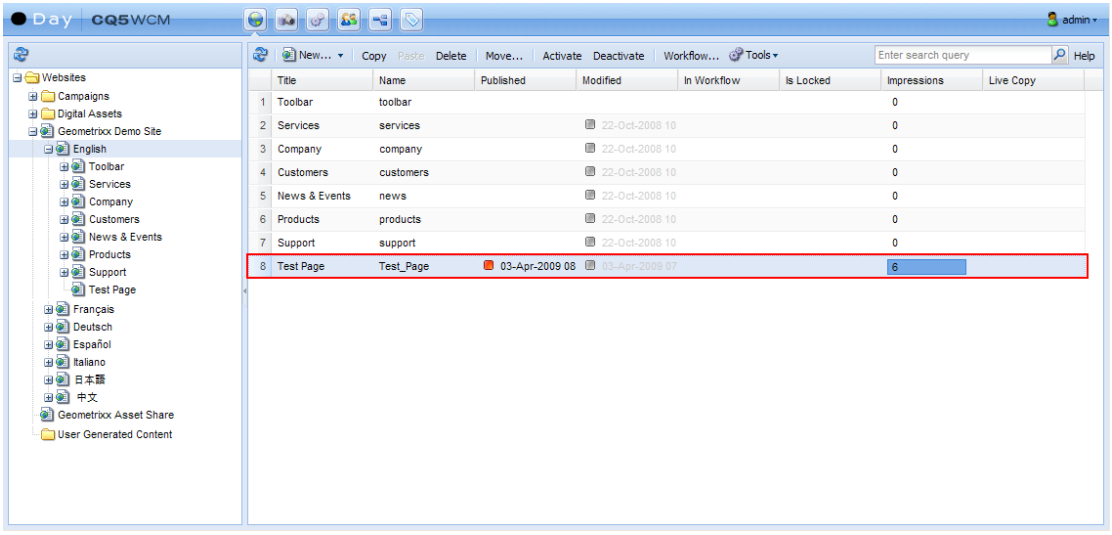
To deactivate a page:

1. In the siteadmin/wcm window, select the page that you want to deactivate.
2. Select **`Deactivate`**, either from the top menu, or the drop-down menu on the selected page item. You are asked to confirm the deletion.



3. Refresh the siteadmin/wcm window and the content is no longer published:

Copyright 1993-2009 Day Management AG



3.5.3 Determining Page Publication Status

The colors next to pages in the siteadmin/wcm window indicate publication status.

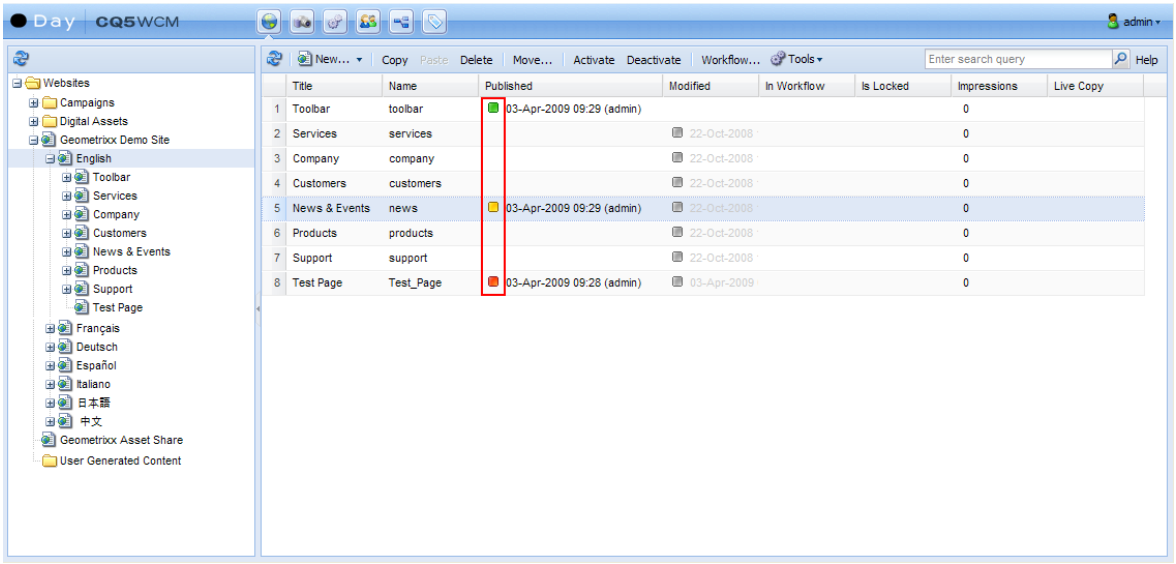


Table 3.3.

Color	Description
Green	Publication was successful. Content is published.
Yellow	Publication is pending. Confirmation of publication has not yet been received by the system.
Red	Publication failed. There is no connection with the publish instance. This can also mean that the content was deactivated.
blank	This page has never been published.

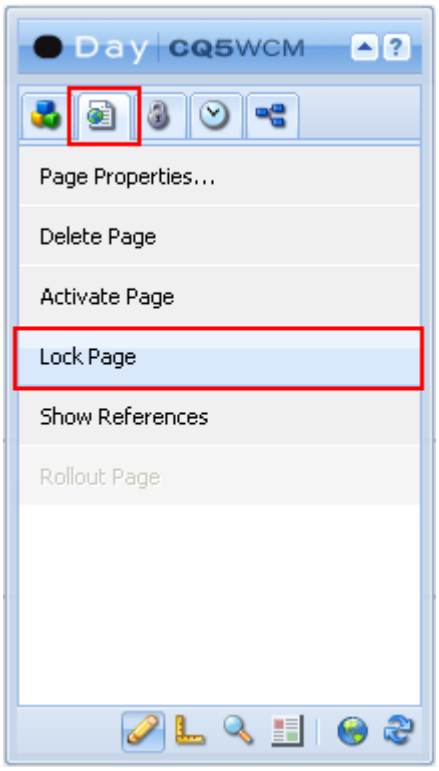
3.5.4 Locking Pages

To lock a page that you are working on so no one can modify the contents or activate it:

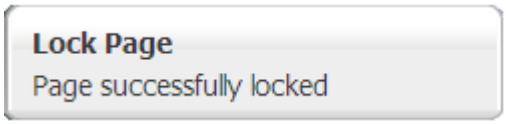
1. In the siteadmin/wcm window, select the page that you want to lock.
2. **`Double-click`** the page to open it for edit.

Copyright 1993-2009 Day Management AG

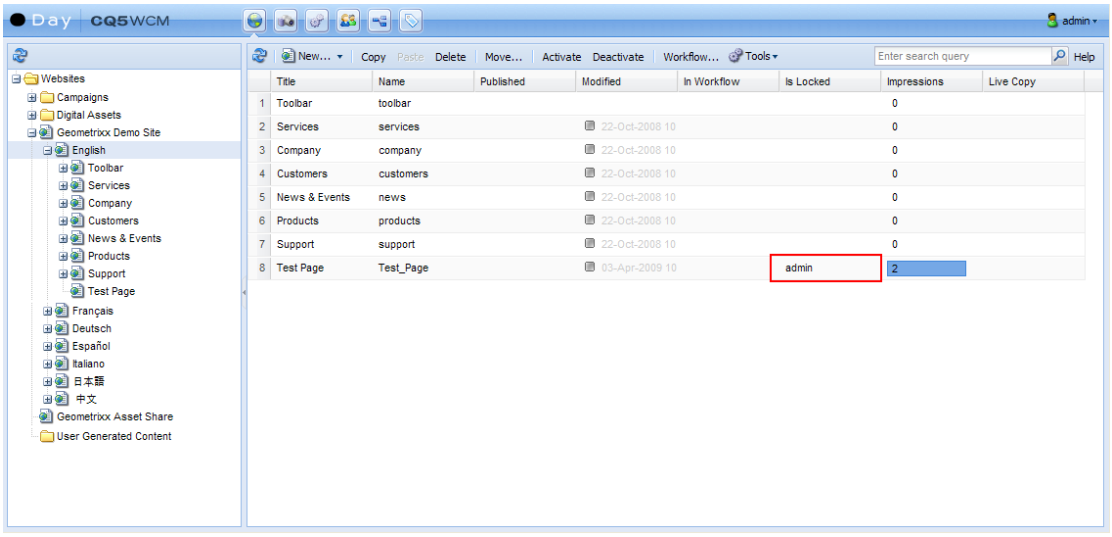
3. In the **Page** tab of sidekick, select **Lock Page**:



4. A message shows that your page is locked to other users:



5. CQ WCM displays the page as locked and indicates which user has locked the page.



3.5.5 Unlocking Pages

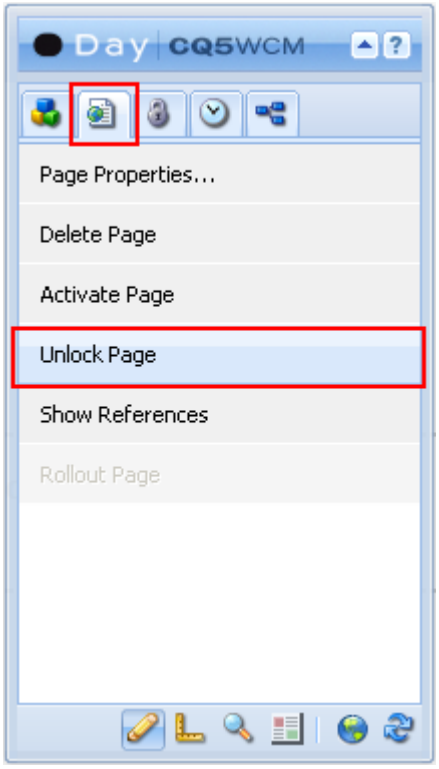
You can only unlock locked pages if you locked the page or if you have administrator privileges.

To unlock a page:

1. In the siteadmin/wcm window, select the page you want to unlock.
2. **Double-click** the page to open it for edit.

Copyright 1993-2009 Day Management AG

3. In the **Page** tab of sidekick, select **Unlock Page**:

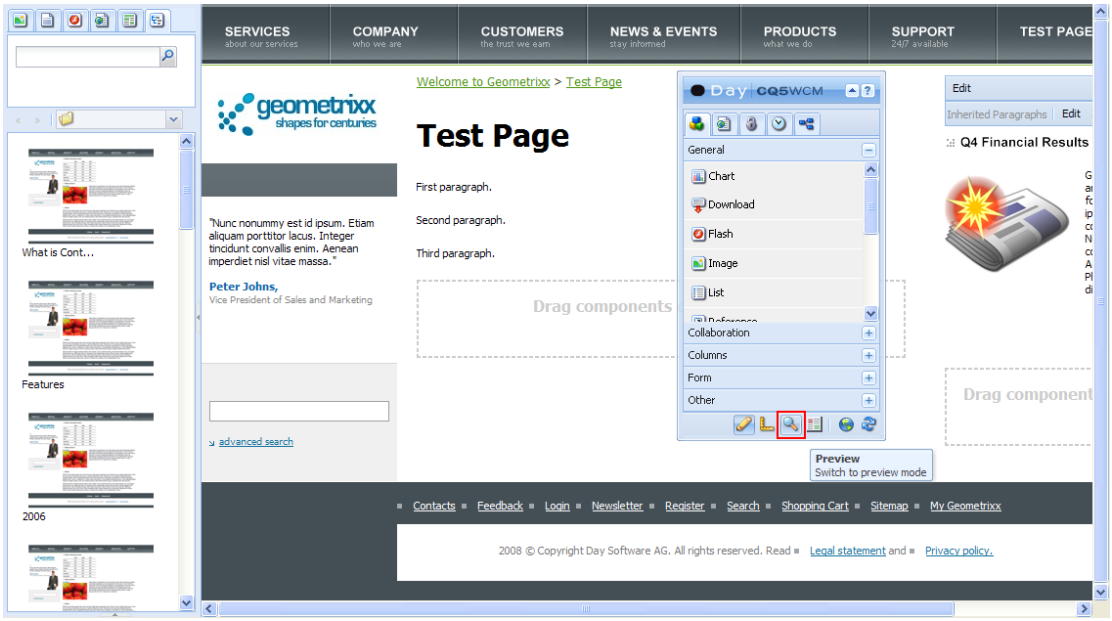


3.5.6 Using Preview Mode

This mode allows you to preview the page as if it were appearing on your website in its final form.

To access Preview mode:

1. In the siteadmin/wcm window, open the page you want to view in Edit mode.



2. In the sidekick, click the magnifying glass (preview mode). CQ WCM displays the page as it appears on your web site in its final form.

3.6 How To Restore Pages

This section describes how to restore pages that have been previously deleted.

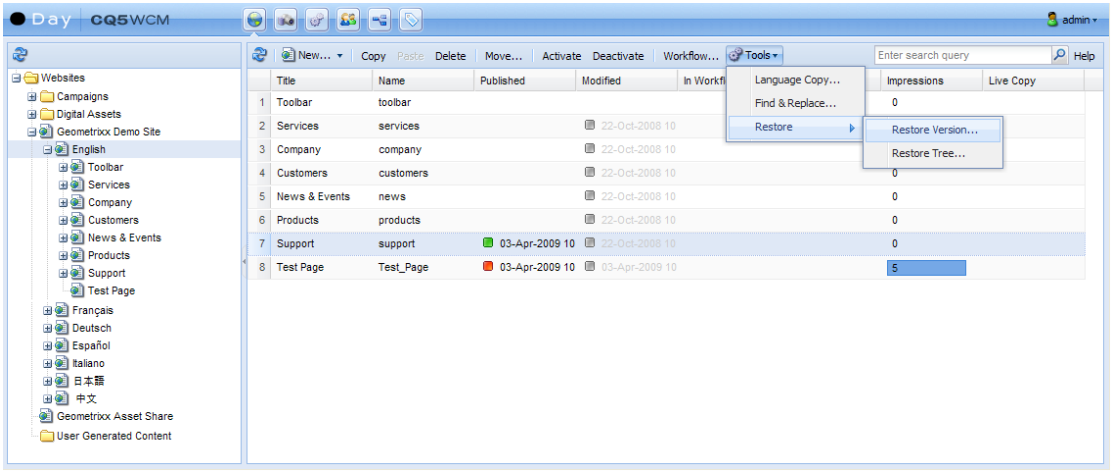
Copyright 1993-2009 Day Management AG

Note

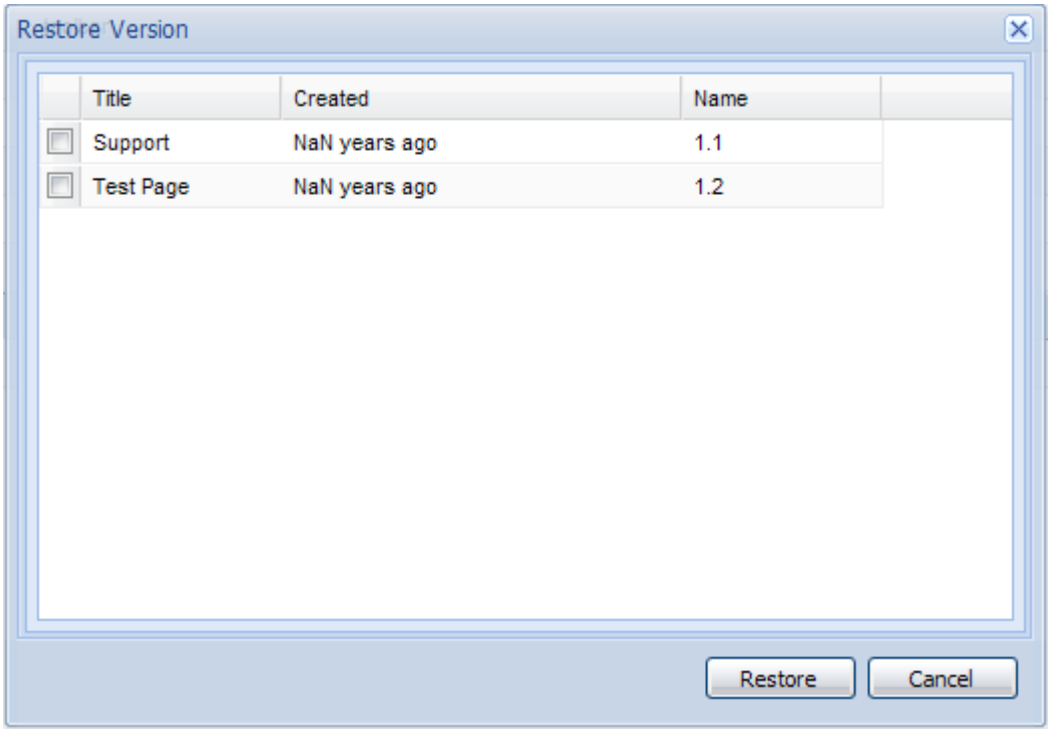
Only pages that have been previously activated can be restored. Each time you activate a page or tree, CQ WCM creates a new version of that page or tree.

To restore a page to a previous version:

1. In the wcm/siteadmin window, navigate to the page you want to restore and select it.
2. From the top menu select **`Tools`**, then **`Restore`**:



3. Selecting **`Restore Version...`** lists previous versions of the document. Selecting **`Restore Tree...`** lists previous versions of the content tree.



4. Click **`Restore`**. CQ WCM restores the version(s) (or trees) that you select.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

4 Default Components

CQ WCM comes with a variety of out-of-the-box components that provide comprehensive functionality for website authors. These components and their usage within the installed "Geometrixx" website are a reference on how to implement and use components.

The following section includes an overview of all default components as well as a description of each component item and examples of what the components look like in CQ5.

When working with any components, you can add them either by double-clicking **`Drag components or assets here`** or dragging and dropping the component from the sidekick onto the page. Some default components are hidden from view and are usually only added by a developer. The procedure for adding these components is described in the section called "Developing Components"

4.1 Overview of components

The following components are included in the basic installation within the Geometrixx website. The table lists all components that are available from within the sidekick, when inserting a new component, and all the components that are available in Deisgn mode. By default, every component available in the sidekick is also available in Design mode.

If components are available in the sidekick **by default**, the column "Availability in Sidekick by Default" will indicate "Yes." If components are available in Design mode only, and they are not available in the sidekick by default, this column will indicate "No."

Note

If someone enables or adds a component, then additional components may become available in the sidekick. For those components, the "Section" column indicates where the components appear in the sidekick once activated.

These components can be selected and positioned on your page when editing:

Table 4.1. Components within CQ5

Title	Section	Purpose	Availability in Sidekick by Default?	Equivalent in CQ4
Chart	General	Dynamic bar, line or pie chart created from raw data.	Yes	
Column Control 2 Columns 3 Columns	Columns	Mechanism for controlling and formatting columns. 2 and 3 Columns are the same component, but default to 2 and 3 columns respectively.	Yes	columncontrol
Checked Password Field	Form	Requests password and confirmation of password.	Yes	
Comments	Collaboration	List of visitor comments.	Yes	
Delete Action	Action	Lets users delete selected assets.	No	
Download	General	Makes a file available for download by the website visitor.	Yes	download
Download Action	Action	Lets users download selected assets.	No	

Copyright 1993-2009 Day Management AG

Title	Section	Purpose	Availability in Sidekick by Default?	Equivalent in CQ4
Edit Metadata Action	Action	Lets users edit tags and metadata of selected assets.	No	
Flash	General	Allows you to enter a flash movie.	Yes	
Form	Form	The start and end components required for a form definition.	Yes	
Forms Address Field	Form	A complex field allowing the input of an international address.	Yes	forms
Forms Captcha	Form	A field consisting of an alphanumeric word that refreshes automatically. The captcha component protects websites against bots.	Yes	
Forms Checkbox Group	Form	Multiple items organized into a list and preceded by check boxes. Users can select multiple check boxes.	Yes	
Forms Dropdown List	Form	Multiple items organized into a drop-down list. The **`Multi Selectable`** switch specifies if several elements can be selected from the list.	Yes	
Forms End	General	Ends the form.	No	
Forms File Upload	Form	An upload element that allows the user to upload a file to the server.	Yes	
Forms Hidden Field	Form	This field is not displayed to the user. It can be used to transport a value to the client and back to the server. This field should have no constraints.	Yes	
Forms Image Button	Form	An additional submit button for the form that is rendered as an image.	Yes	
Forms Password Field	Form	Same as text field but only a single line is allowed and the text input from the user is not visible in the field.	Yes	
Forms Radio Group	Form	Multiple items organized into a list preceded by a radio button. Users must select only one radio button.	Yes	
Forms Submit Button	Form	An additional submit button for the form where the title is displayed as text on the button.	Yes	
Forms Text Field	Form	Text field that allows users to enter information.	Yes	

Copyright 1993-2009 Day Management AG

Title	Section	Purpose	Availability in Sidekick by Default?	Equivalent in CQ4
Header	N/A	Displays a graphical header banner at the top of the page, together with overlaying text	No	
Image	General	Displays an image, with a (short) description displayed below.	Yes	image
Inheritance Paragraph System (iparsys)	N/A	Is a paragraph system that also allows you to inherit the created paragraphs from the parent.	No	
List	General	Displays a configurable list of searched items.	Yes	generic list
Logo	N/A	Is a clickable image that points to another part of the site.	No	
My Gadgets	Other	Allows you to include one of a selection of gadgets available.	Yes	
Package Definition	General	Allows you to define packages.	No	
Paragraph System (parsys)	N/A	Is a compound component that lets authors add components of different types to a page and contains all other paragraph components.	No	
parbase	N/A	Is a key component as it allows components to inherit attributes from other components, similar to subclasses in object oriented languages. Users do not need access to this component.	No	
Profile Avatar Photo	Collaboration	Allows input of an Avatar Photo.	Yes	
Profile Detailed Name	Collaboration	Input of name details, including elements such as title, middle name and suffix if required.	Yes	
Profile Display Name	Collaboration	Name to be displayed.	Yes	
Profile E-mail	Collaboration	Input of an e-mail address.	Yes	
Profile Gender	Collaboration	Allows input of the gender.	Yes	
Profile Primary Phonenumber	Collaboration	Allows input of a telephone number.	Yes	
Profile Primary URL	Collaboration	Allows input of a URL.	Yes	
Profile General Text property	Collaboration	Profile properties.	Yes	
Product List	General	Grid-oriented table that allows for input that can be imported and exported (such as in a catalog).	No	

Copyright 1993-2009 Day Management AG

Title	Section	Purpose	Availability in Sidekick by Default?	Equivalent in CQ4
Ratings	Collaboration	Visitor ratings.	Yes	
Reference	General	A reference to content on another page. This allows reuse of content without redundant copies of that content. Reference is linked to the original content so that changes to the original are automatically reflected.	Yes	
Search	Other	A search dialog with related search functionality.	Yes	search
Sign-in	Form	Allows you to submit a username and password when logging in.	Yes	
Sign-in Sign-up	Form	Allows you to either sign in to an existing account, or to sign up for a new account.	Yes	
Sign-out	Collaboration	Indicates the user currently logged in, and gives you a link to log out.	Yes	
Sitemap	General	A sitemap listing all pages.	Yes	
Slideshow	General	Dynamic slideshow that rotates through a set of selected images.	Yes	
Table	General	A table, with various formatting options.	Yes	table
Tag Cloud	Other	Here a selection of tags from within your website are shown graphically, based on the volume of user visits to the appropriate web pages.	Yes	
Teaser	Other	A piece of content (usually an image) displayed on a main page to "tease" users into accessing the underlying content.	Yes	
Text	General	A text item.	Yes	richtexteditor
Text Image	General	Text with an accompanying image displayed to either the left or right.	Yes	textimagejcr
Title	General	Title of the page (can be different from the page name).	Yes	
Toolbar	N/A	Appears at the bottom of the page and is a navigational tool.	No	

Copyright 1993-2009 Day Management AG

Title	Section	Purpose	Availability in Sidekick by Default?	Equivalent in CQ4
Topnav (Top navigation bar)	N/A	Appears at the top of the page and helps users navigate to the different content sections.	No	
Trail (Breadcrumb)	N/A	Appears at the top of the page and shows users the path they have taken down through the hierarchy.	No	

4.2 Components available from the Sidekick (or Insert New Component)

The following components are part of the standard library of components available in CQ5. Within the siteadmin, they are available from:

- the components tab of the sidekick
- the **`Insert New Component`** selector (when you double-click in the **`Drag components or assets here`** area)

They are sorted according to five categories:

- General: Includes basic components, including text, images, tables, charts, and so on.
- Collaboration: Includes Social Collaboration components, including comments and ratings.
- Columns: Includes components necessary for organizing the layout of the content.
- Form: Includes all the components needed to create a form.
- Other: Includes gadget, search, and tag cloud components.

4.2.1 General

The General components are the basic components that you use to create content, excluding forms, column layout, and specialized components such as tag clouds, search, and gadgets.

4.2.1.1 Chart

The Chart component lets you add a bar, line, or pie chart. CQ WCM creates a chart from the data you provide. You provide data by typing directly into the Data tab or by copying and pasting a spreadsheet.

Copyright 1993-2009 Day Management AG

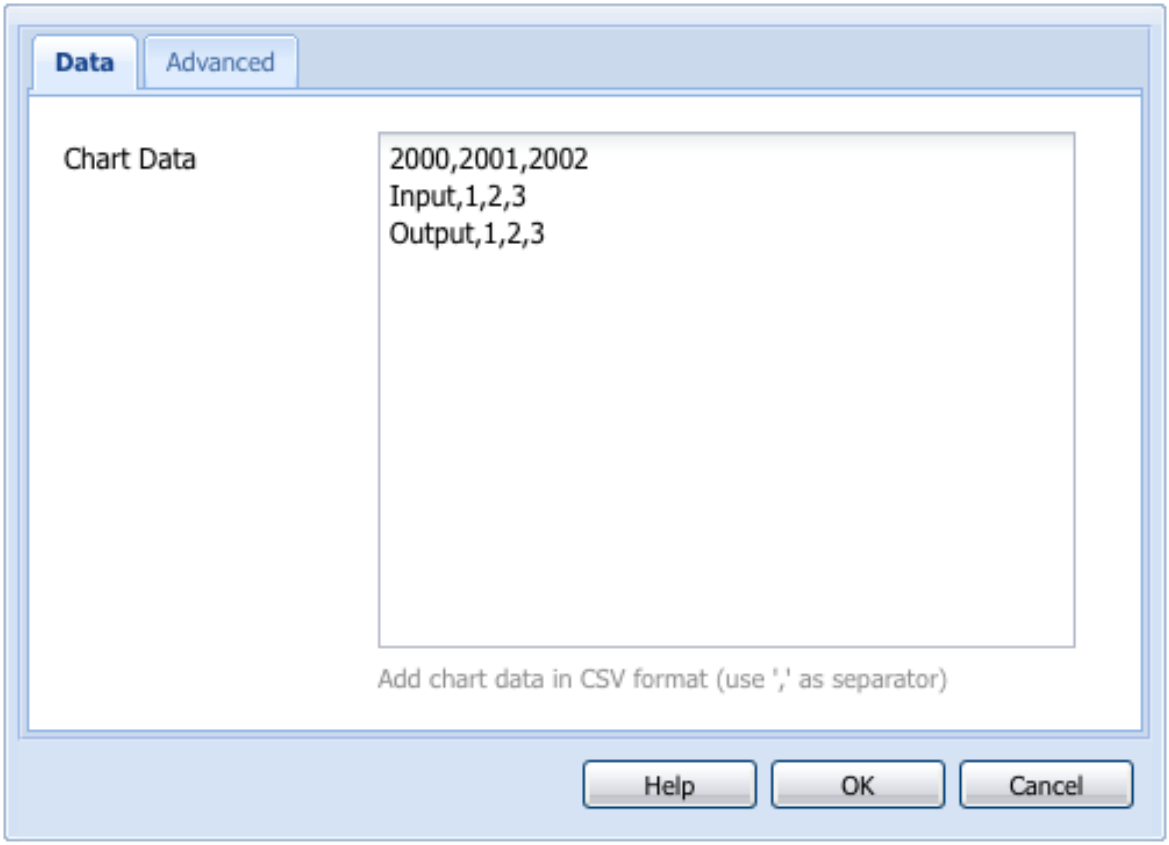
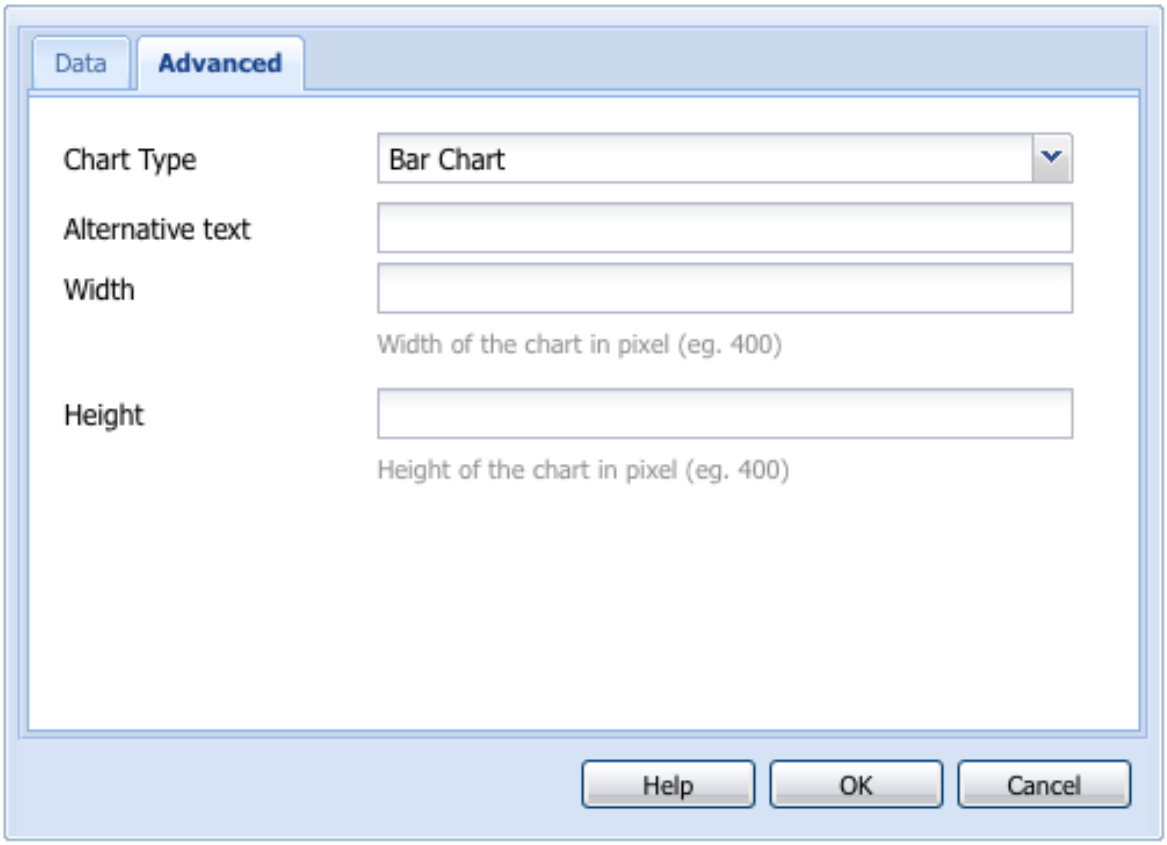


Chart Data

Enter your chart data using the CSV format; the Comma Separated Values format uses commas (“,”) as the field separator.



CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

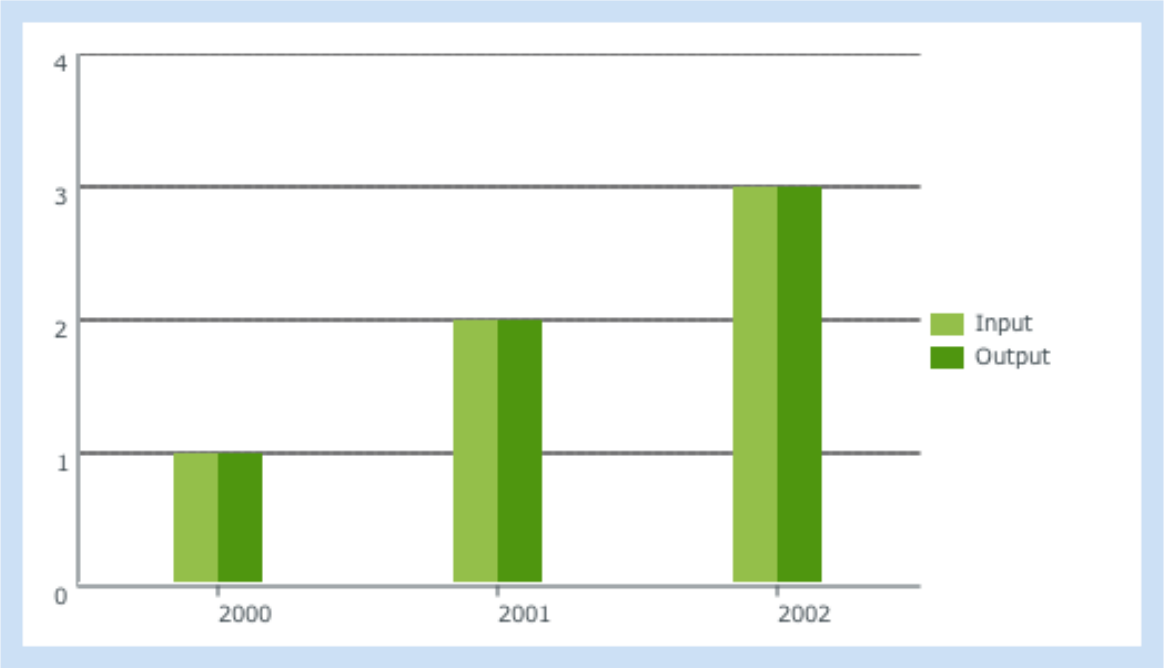
Chart Type
Select from Pie Chart, Line Chart, and Bar Chart.

Alternative text
Alternative text that displays instead of the chart.

Width
Width of the chart in pixels.

Height
Height of the chart in pixels.

The following example is a Bar chart in Geometrixx. It shows the relationships between the table (as in the previous screenshot) and the finished chart:



4.2.1.2 Download

The Download component creates a link on the selected web-page to download a specific file. You can either drag an asset from the Content Finder or upload a file.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

Description
A short description displayed with the download link.

File
File available for download on the resulting web-page.

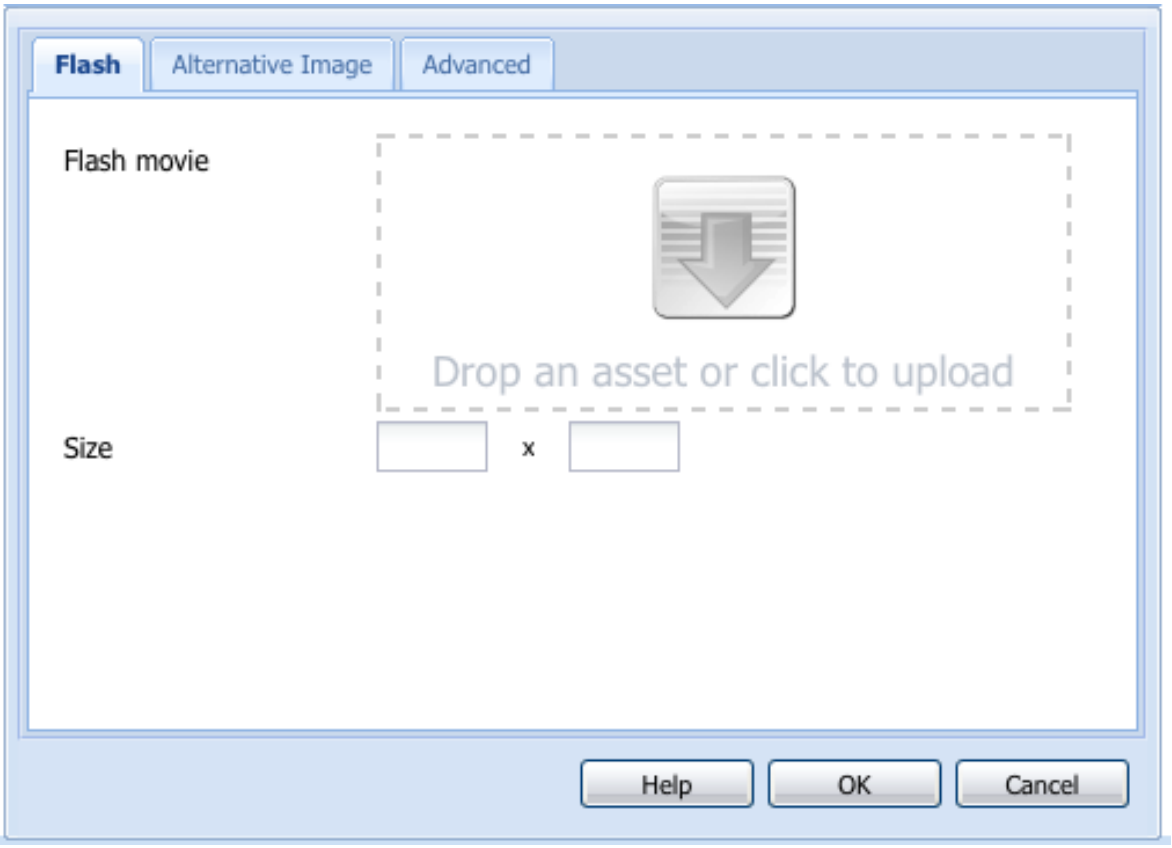
Drag an asset from the content finder or click the area to upload the file to be available for download.

The following example shows the Download component in Geometrixx:

4.2.1.3 Flash

The Flash component lets you load a Flash movie. You can drag a flash asset from the content finder onto the component, or you can use the dialog:

Copyright 1993-2009 Day Management AG



Flash movie
: The flash movie file. Either drag an asset from the content finder, or click to open a browse window.

Size
: Dimensions in pixels of the display area holding the movie.

Alternative Image
: An alternative image to be shown.

Advanced
: Includes all of the following:

  Context menu
  : Indicates whether the context menu should be shown or hidden.

  Window Mode
  : How the window appears, for example opaque, transparent, or a distinct (solid) window.

  Background color
  : A background color selected from the color chart provided.

  Minimum version
  : The minimum version of Adobe Flash Player required to run the movie. The default is 9.0.0.

  Attributes
  : Any further attributes required.

Copyright 1993-2009 Day Management AG

4.2.1.4 Image

The image component displays an image and accompanying text according to the specified parameters. You can either drag and drop and image from the Content Finder or click to upload an image.

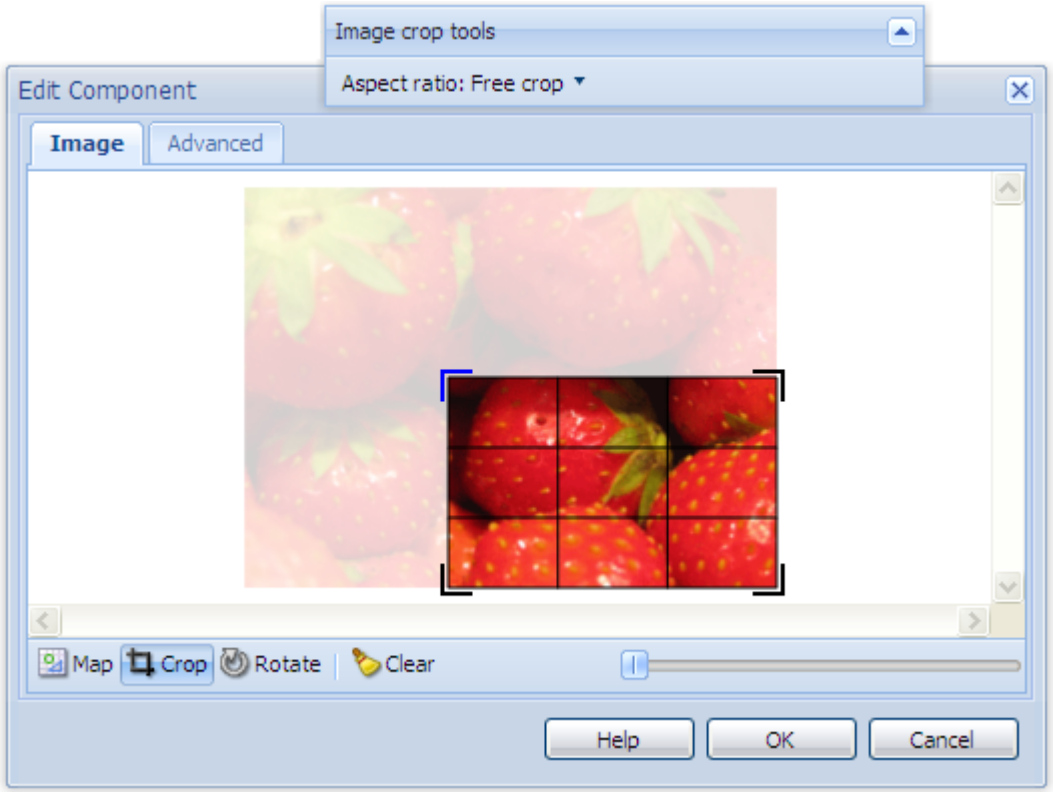


Image
: You can drag an image from the content finder, or click to open a browse window where you can load an image. After the image is loaded, you can create a clickable image map, crop the image, rotate it, or delete it. To zoom in and out of the image, use the slide bar beneath the image (above the **`OK`** and **`Cancel`** buttons)

  Map
  : To map an image, click **`Map`**. You select how you want to create the image map (rectangle, polygon, and so on) and specify where the area should point to.

  Crop
  : Click **`Crop`** to crop an image. Use your mouse to crop the image.

  Rotate
  : To rotate an image, click **`Rotate`**. Click **`Rotate`** repeatedly until the image is rotated the way you want it.

  Clear
  : Remove the current image.

Advanced
: These tools include the title, description, and the size.

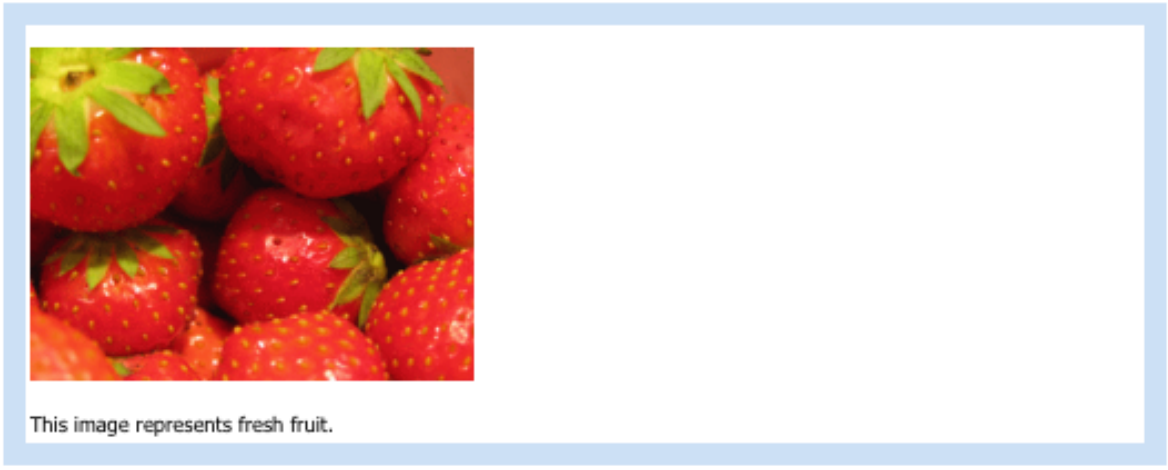
  Title
  : The title of the image.

  Description
  : A description of the image.

Copyright 1993-2009 Day Management AG

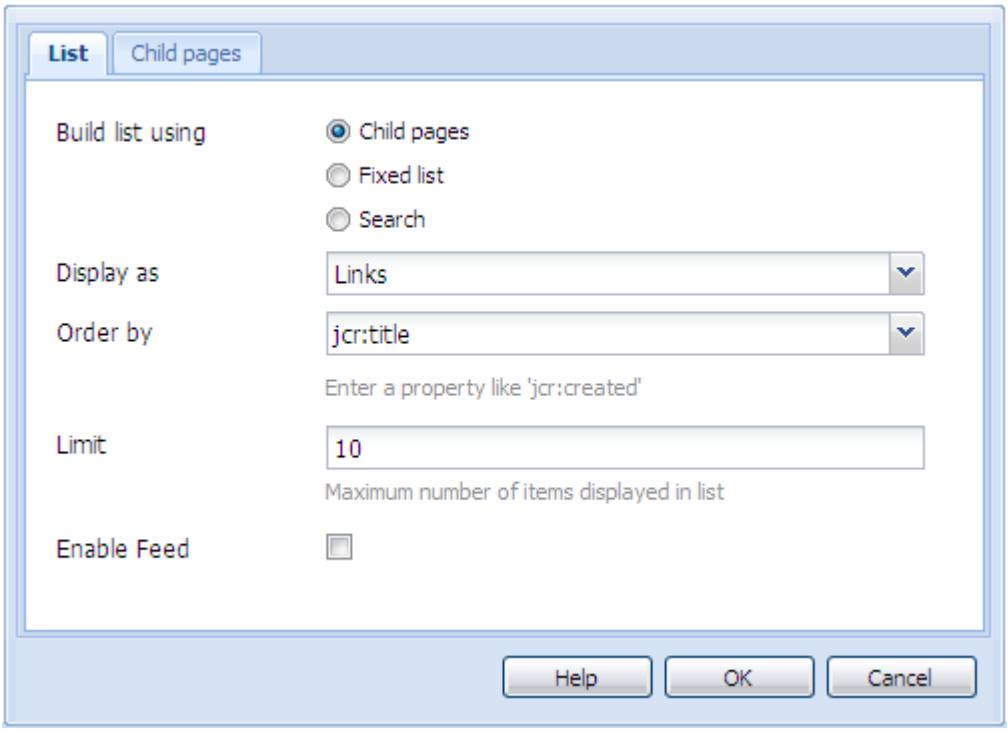
Size
: Sets the height and width of the image.

The following example is an image component used in Geometrixx:



4.2.1.5 List

The List component allows you to configure search criteria for displaying a list:



Build List using
: Here you specify where the list will retrieve its content. There are several methods:

Child pages
: All child pages of the current page will then be listed. If you leave this empty the current page will be used as the root.

Fixed list
: Here you can specify pages to be listed. Use the various buttons to add, remove and position these pages.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

Search
Here you specify the search query and the page to start the query in.

`Start in` specifies the path the search is to occur in. You can either type the complete path directly or type several characters, then use the auto-suggestion provided.

`Search query` may be a simple character string, such as “aenean”, or may have a search-prefix, for example “in:”, “tag:” or “title:” amongst others.

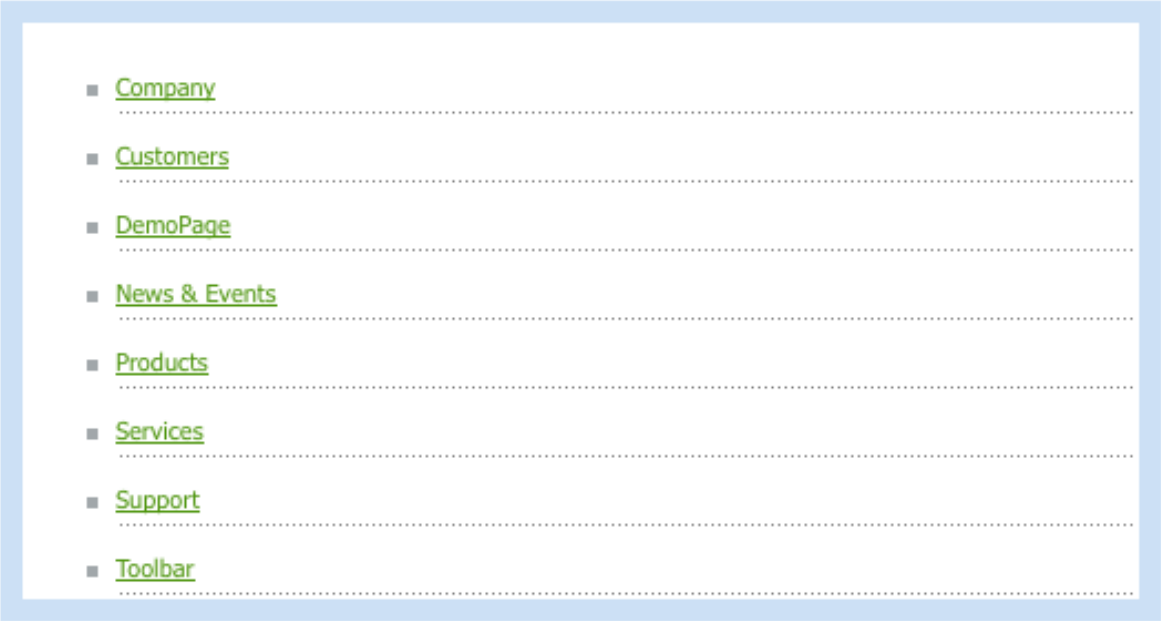
Display as
How you want the items to be listed; includes Links, Teasers and News.

Order by
Whether the list is to be ordered, and if so, the criteria to use for sorting. You can enter a criteria or select one from the drop down list provided.

Limit
Specify the maximum number of items that you want displayed in the list.

Enable Feed
Indicates whether an RSS feed should be activated for the list.

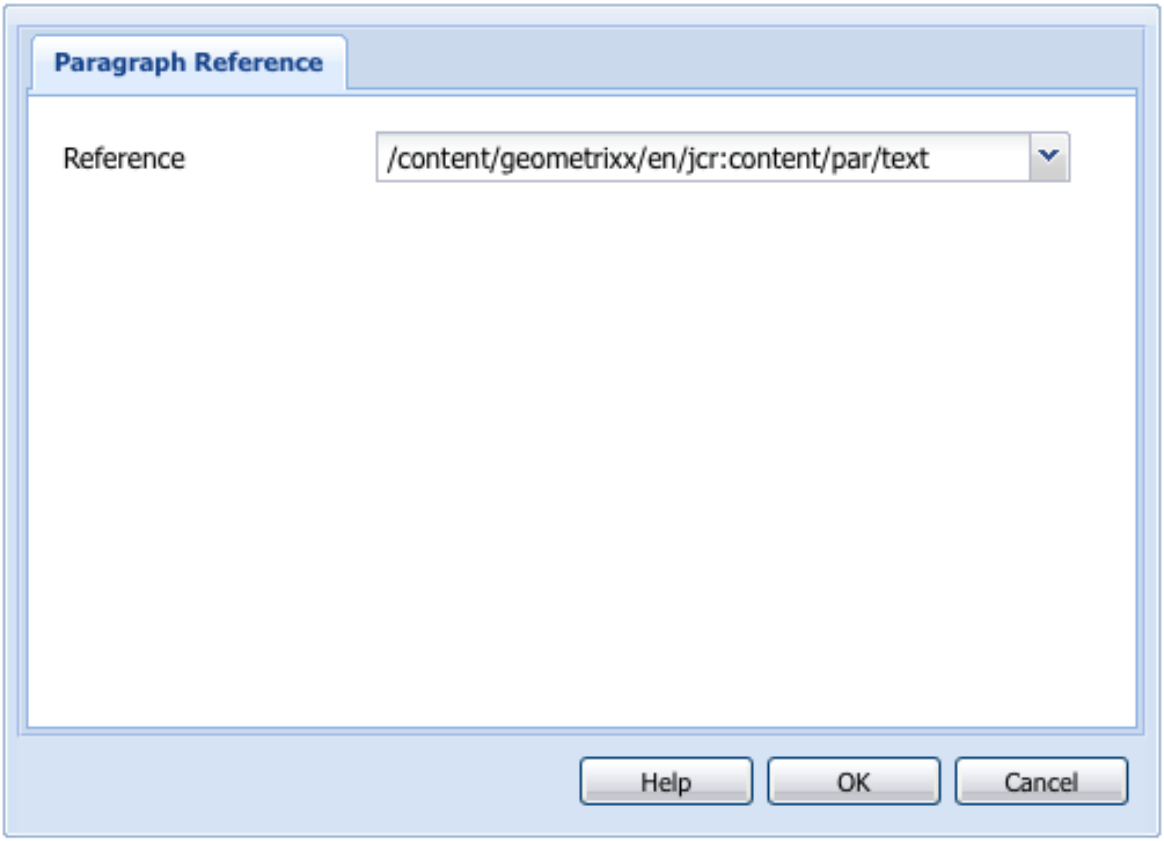
The following example shows a **`Child Pages`** component used in Geometrixx:



4.2.1.6 Reference

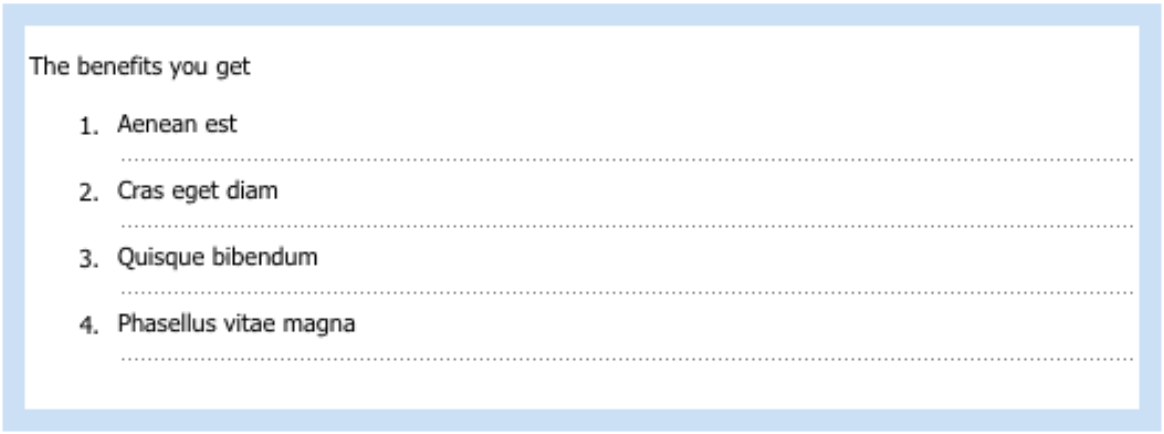
The Reference component lets you reference text in another part of a CQ5 site (within the current instance). The referenced paragraph will then appear as if it was on the current page.

Copyright 1993-2009 Day Management AG



Reference
Click to access a tree of the site pages. Select a page and click **OK**.

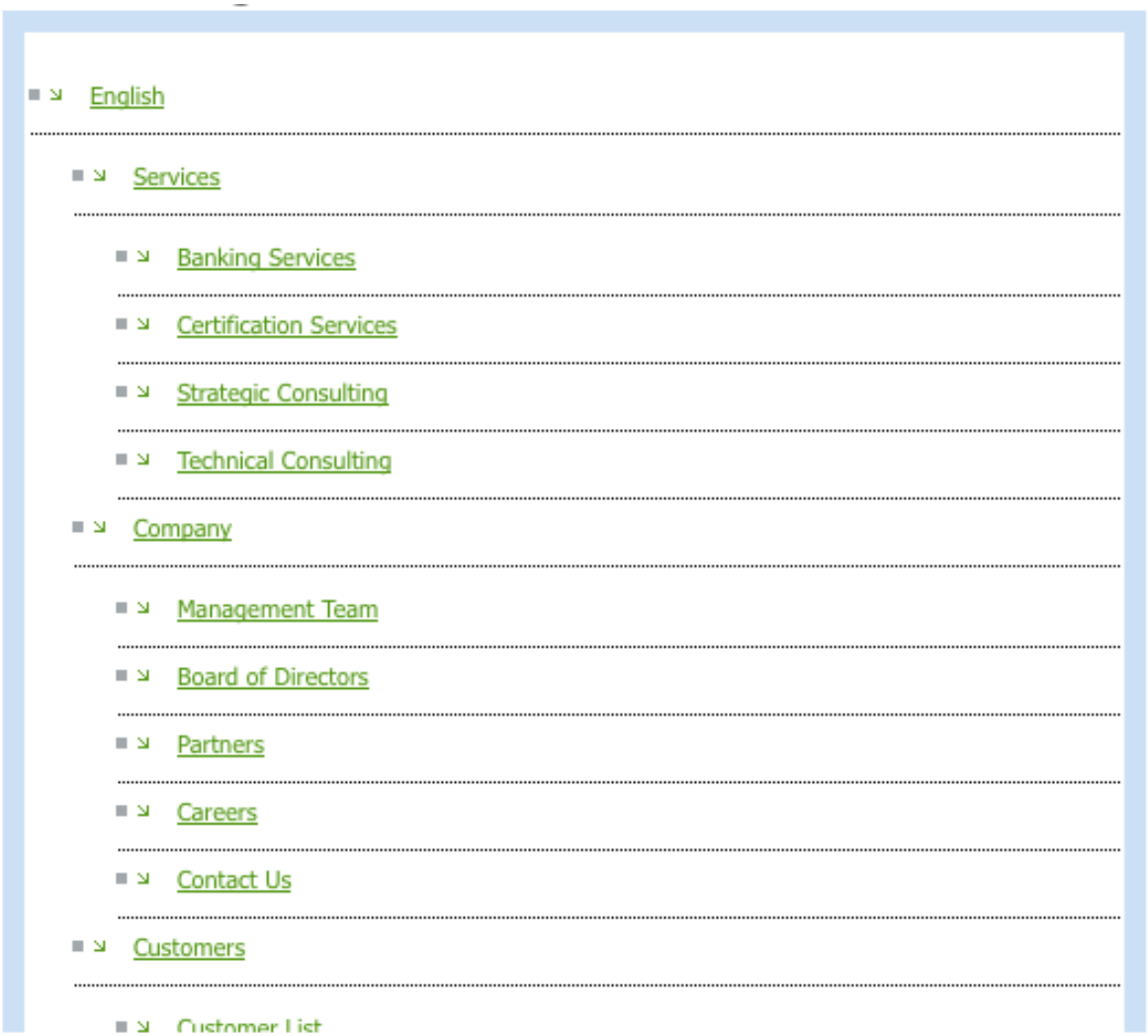
The following example shows the Reference component used in Geometrixx (a text element referenced from another page):



4.2.1.7 Sitemap

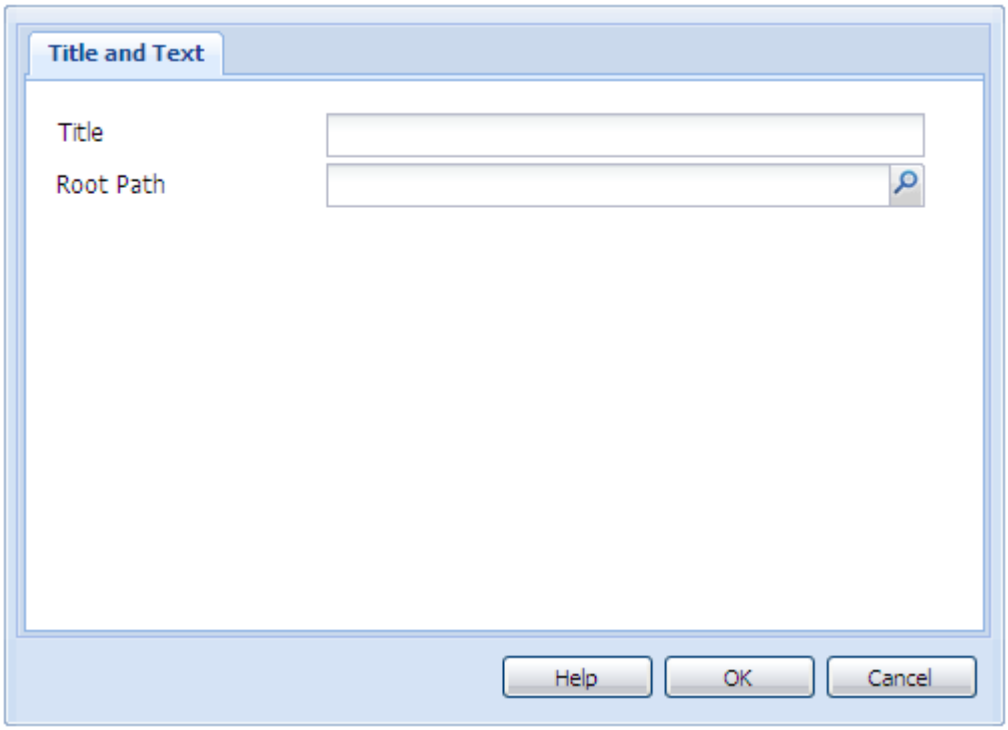
An automatic sitemap listing, which with the default settings lists all pages (with active links) in the current website:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



If required you can edit this component:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Title
Title when displaying the sitemap.

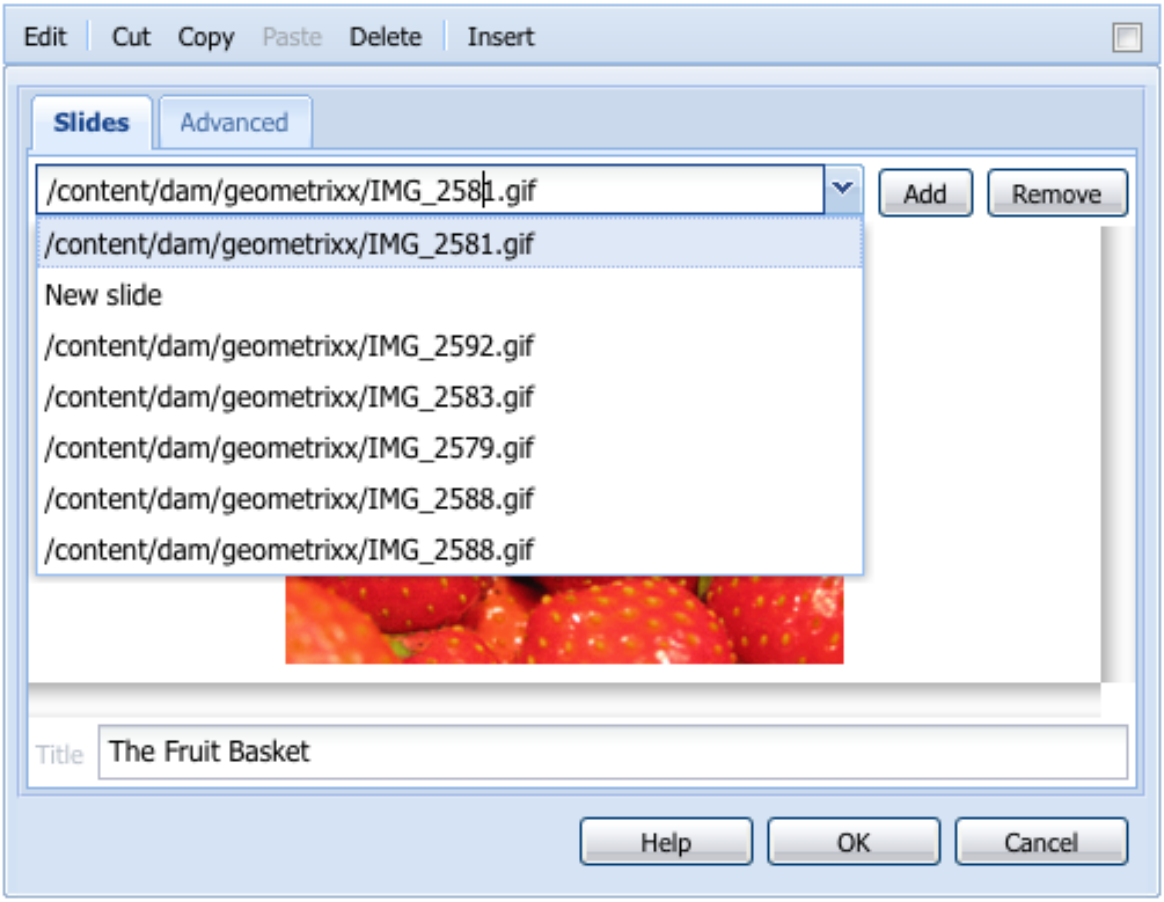
Root Path
Path from where the listing is to start.

4.2.1.8 Slideshow

This component allows you to load a series of images to be displayed as a slideshow on your page.

You can add or remove images and assign each a title. Under **Advanced** you can also specify the size of the display area.

Copyright 1993-2009 Day Management AG



The slideshow component then repeatedly displays each in sequence, for a short period of time:

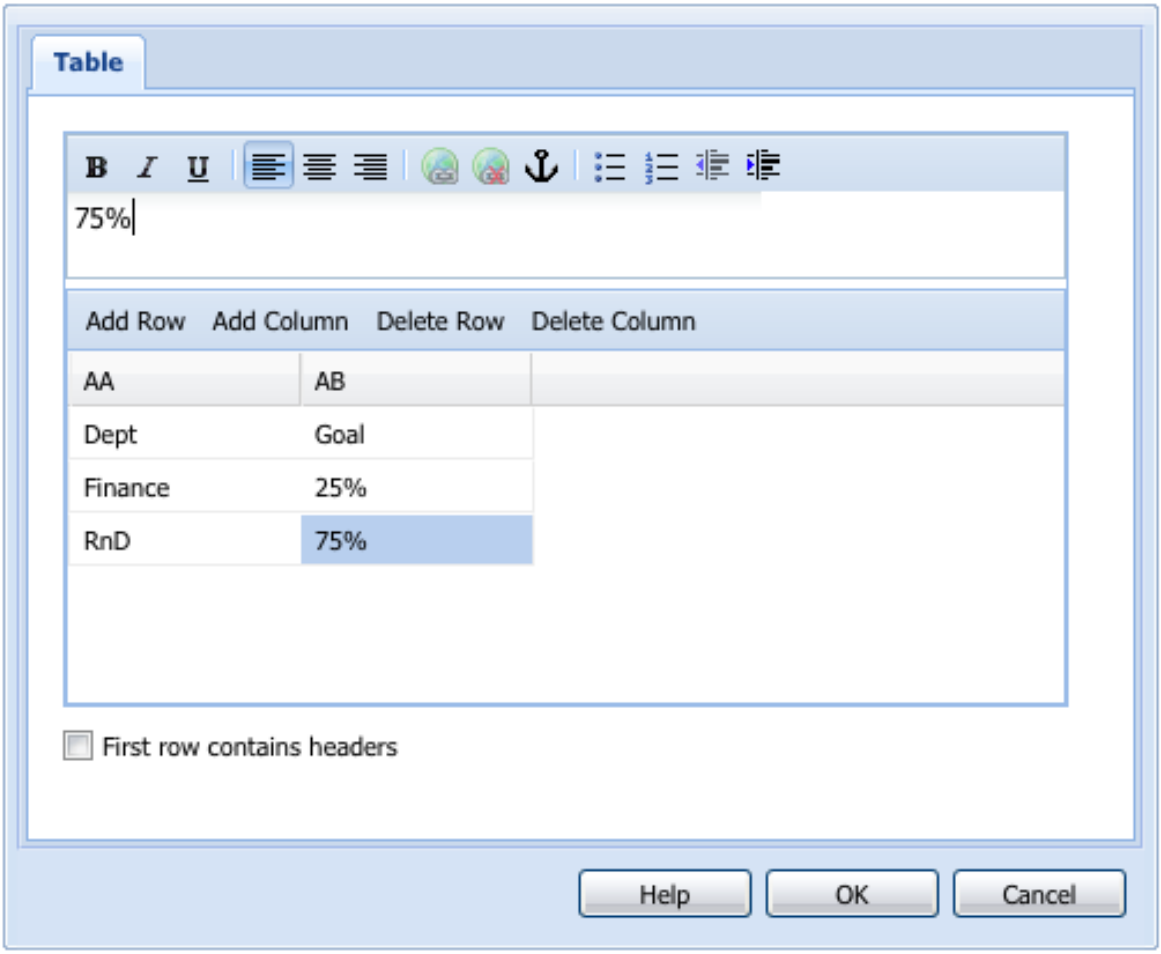
4.2.1.9 Table

The table component lets you add a table. You can create a table component, either by copying and pasting a spreadsheet or a table from another external editor (such as Notepad) into CQ

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

WCM, or you can create one from scratch. Using **Tab** in the table component moves you from field to field and does not create separate columns in a table.

If you are typing the table contents directly into the table, you manually add rows and columns by clicking the appropriate button. Put the cursor in the cell you want to add text to and type the information into the Rich Text Editor. The information appears in the selected cell.



Rich Text Editor
: The area at the top of the dialog is for editing the contents of the currently selected cell. You can edit how the text appears (bold, italics, underline), how the text in the cell is aligned, add hyperlinks, and add numbered and bulleted lists to the cells.

Add Row
: Adds a row to the table.

Add Column
: Adds a column to the table.

Delete Row
: Deletes a row from the table.

Delete Column
: Deletes a column from the table.

First Row contains headers
: Select this check box if the first row is a header row.

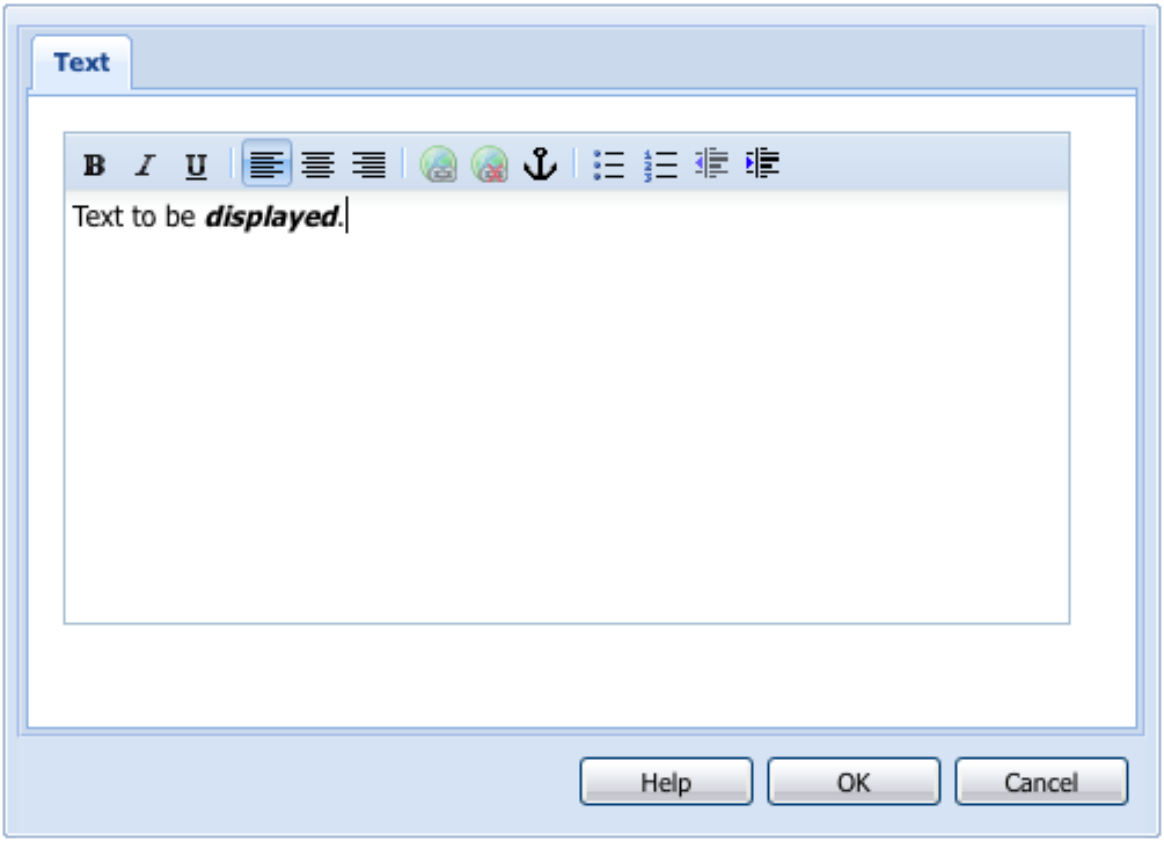
The following example shows the use of the table component in Geometrixx:

Copyright 1993-2009 Day Management AG

Dept	Goal
Finance	25%
RnD	75%

4.2.1.10 Text

The Text component lets you enter a text block using a WYSIWYG editor. A selection of icons allow you to format your text, including font characteristics, alignment, links, lists and indentation:



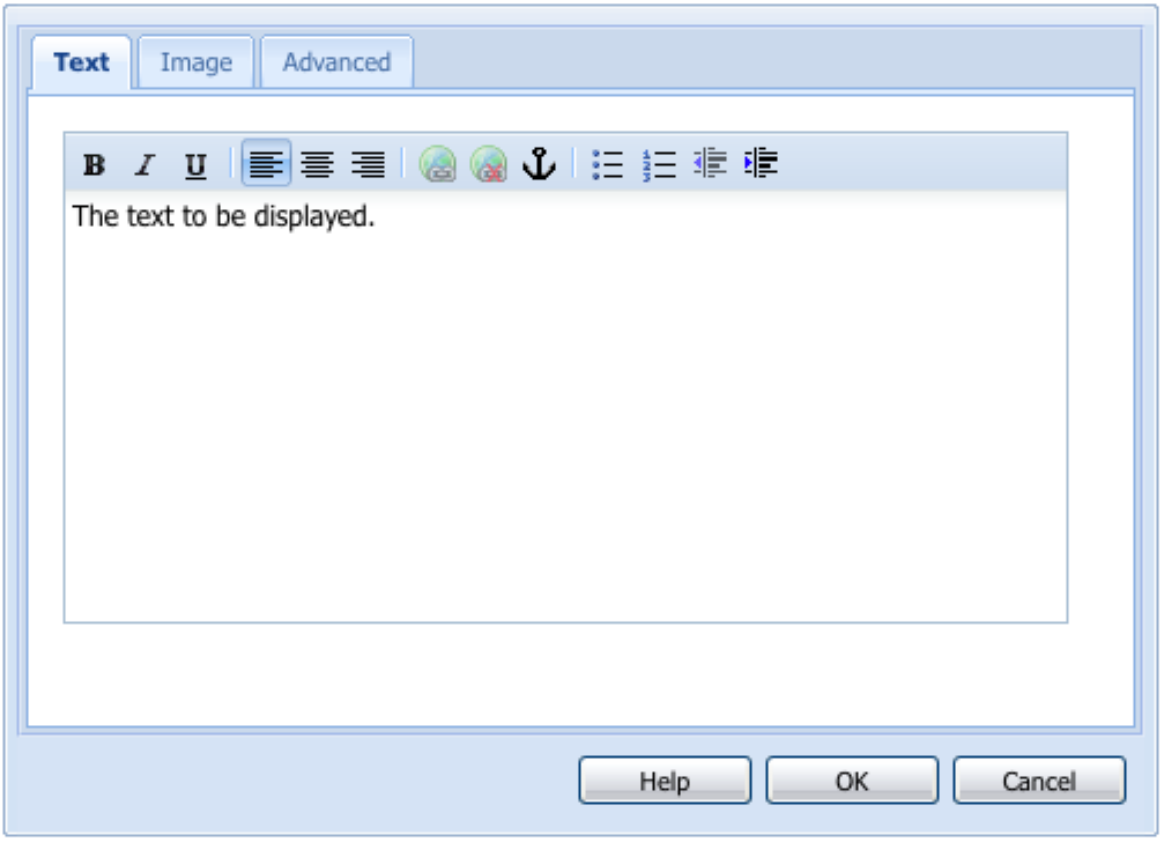
The following example shows the Text component used in Geometrixx:

Text to be ***displayed***.

4.2.1.11 Text Image

The Text Image component adds a text block and an image. You can also add text and images separately. See Text and Images for details.

Copyright 1993-2009 Day Management AG



Text
: Enter text. Use the toolbar to modify formatting, create lists, and add links.

Image
: Drag an image from the content finder, or click to browse to an image. Crop or rotate as required.

Advanced
: Allows you to specify the following:

  Title
  : Enter the title of the block.

  Alt Text
  : Alternative text to be shown if the image cannot be displayed. If left empty the title will be used.

  Description
  : A description of the image.

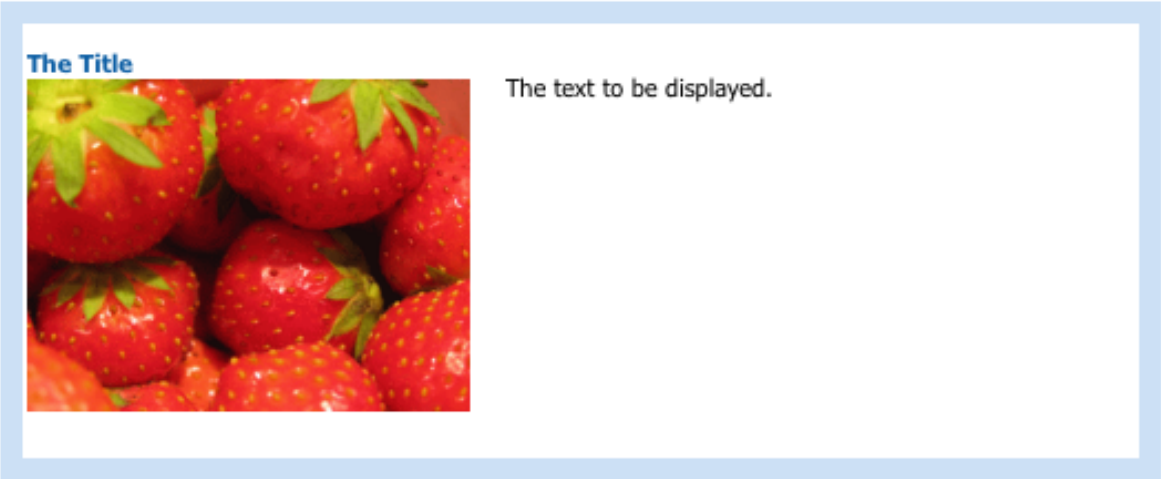
  Size
  : Sets the height and width of the image.

  Style
  : Here you can either left or right align the image.

    The default is **`Left aligned`**, with the image at the left.

The following example shows a Text Image Component in Geometrixx:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

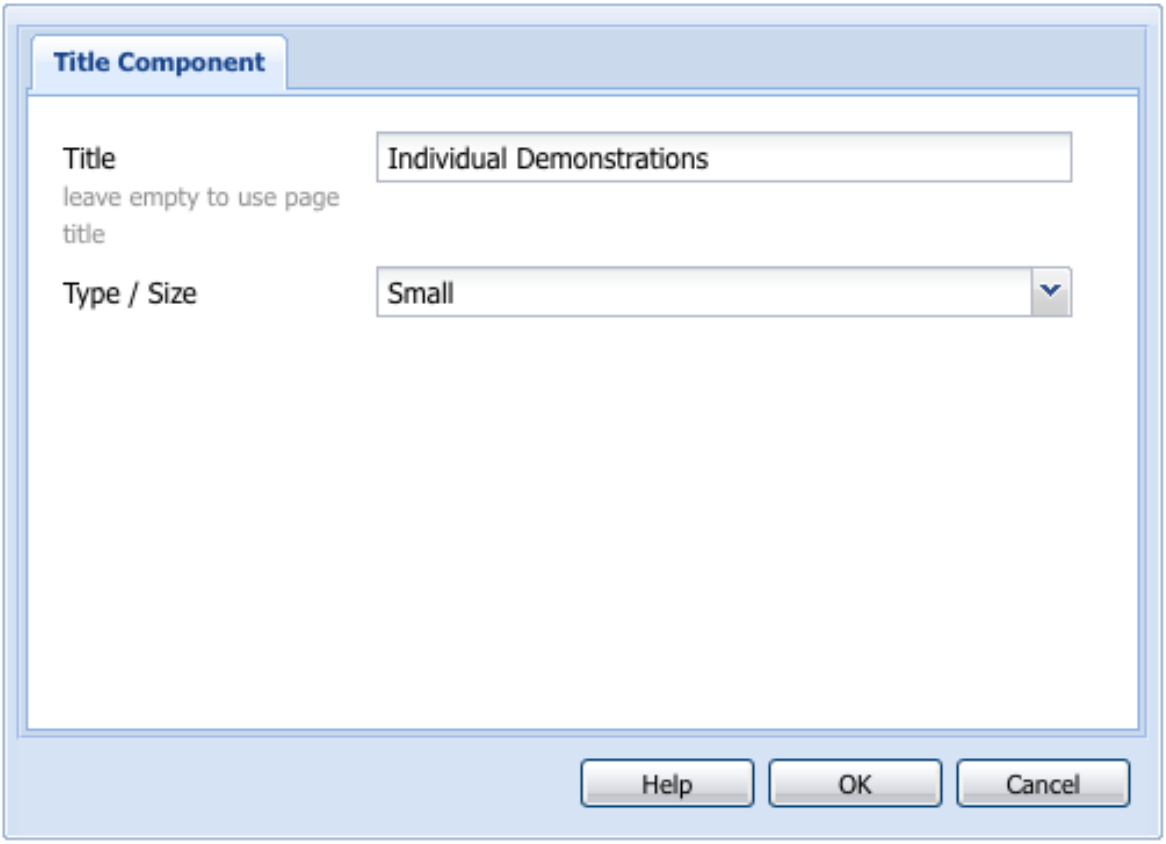


4.2.1.12 Title

The title component can either:

- display the name of the current page, by leaving the **`Title`** field blank
- display a text you specify in the **`Title`** field

You can also specify the text size you want.



Title
: If you want to use a name other than the page title, enter it here.

Type/Size
: Select Small or Large from the dropdown list.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

Small is generated as an image. Large is generated as text.

The following example shows a **`Title`** component in Geometrixx:

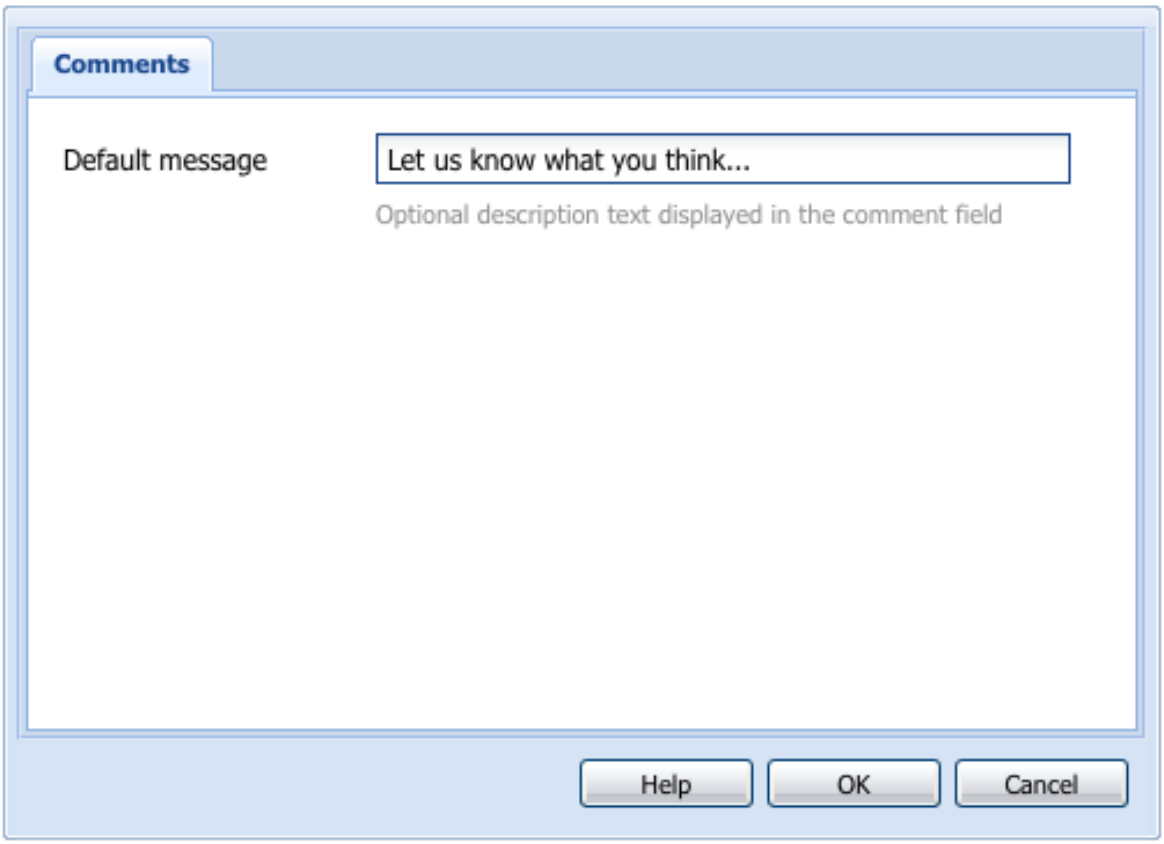
4.2.2 Collaboration

Social Collaboration components enable visitors to your website to provide their input.

4.2.2.1 Comments

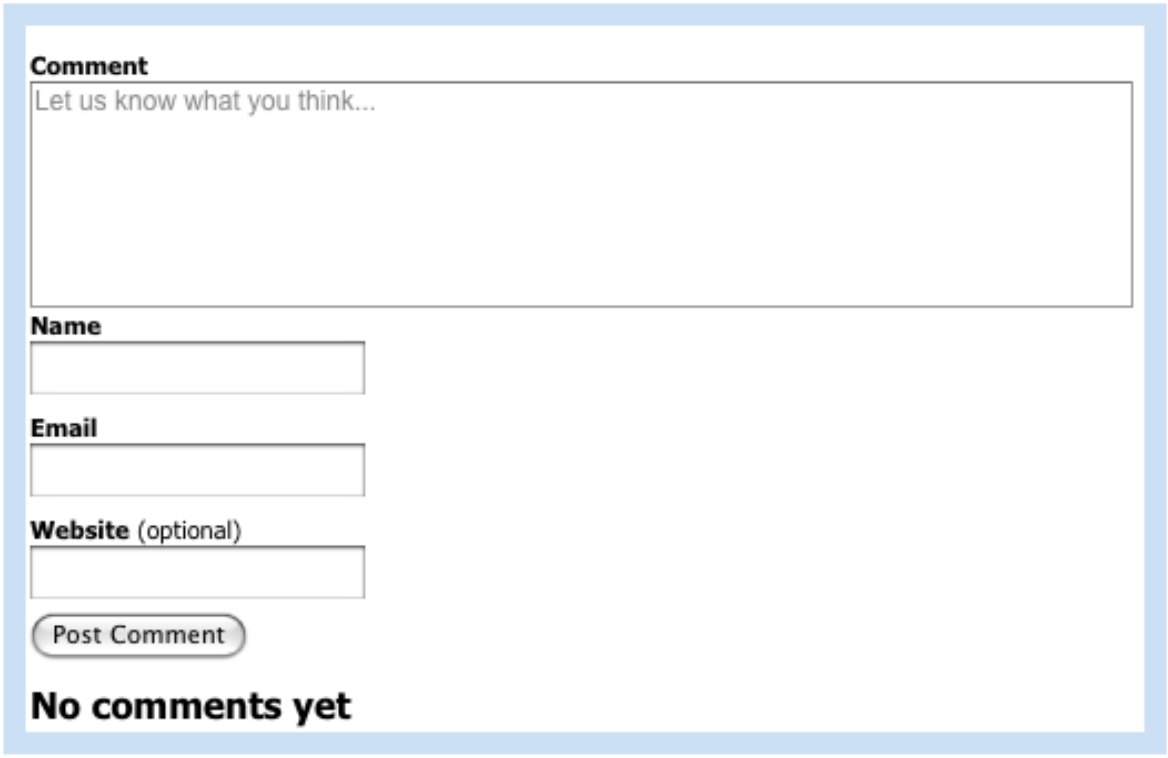
This component allows visitors to leave comments about the current page or paragraph.

You can enter a Default Comment to indicate what they should comment on:



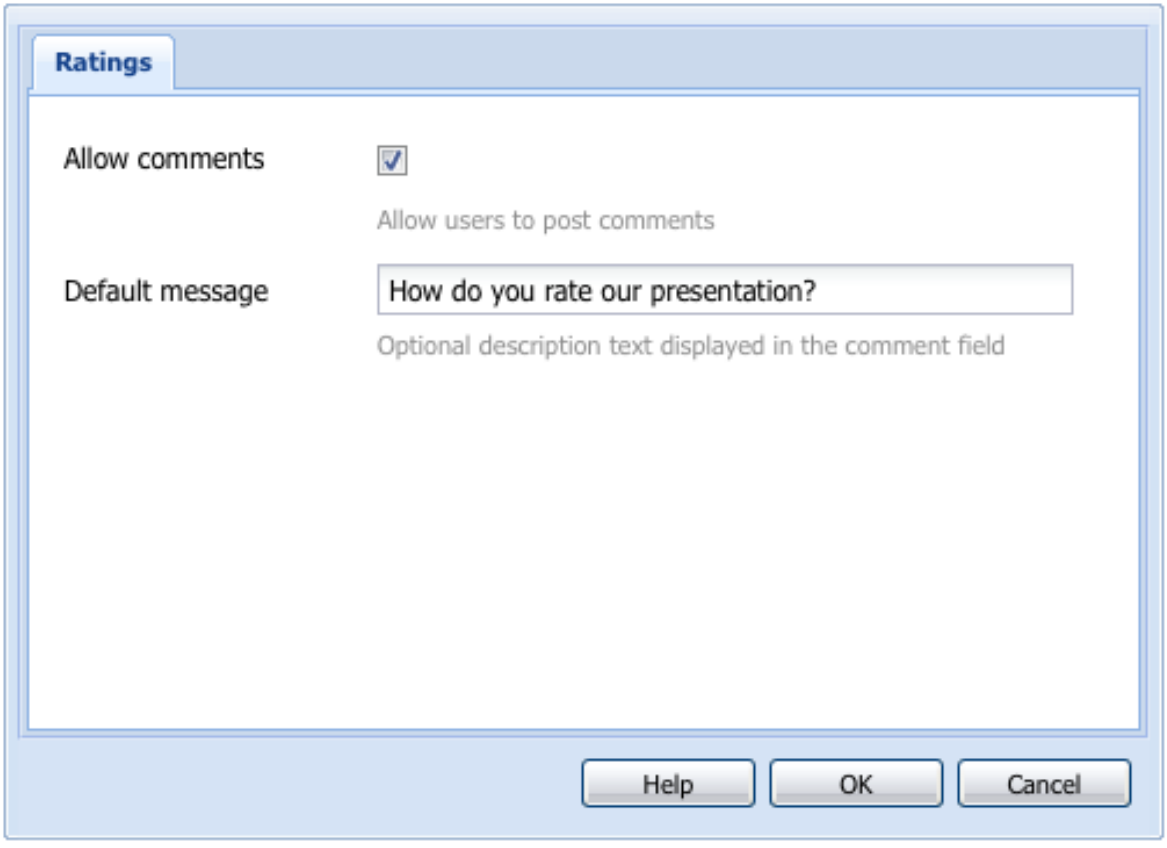
The visitor will then be able to leave a comment together with a few basic details about themselves:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



4.2.2.2 Ratings

The **`Ratings`** component allows the visitor to rate the current page or paragraph.

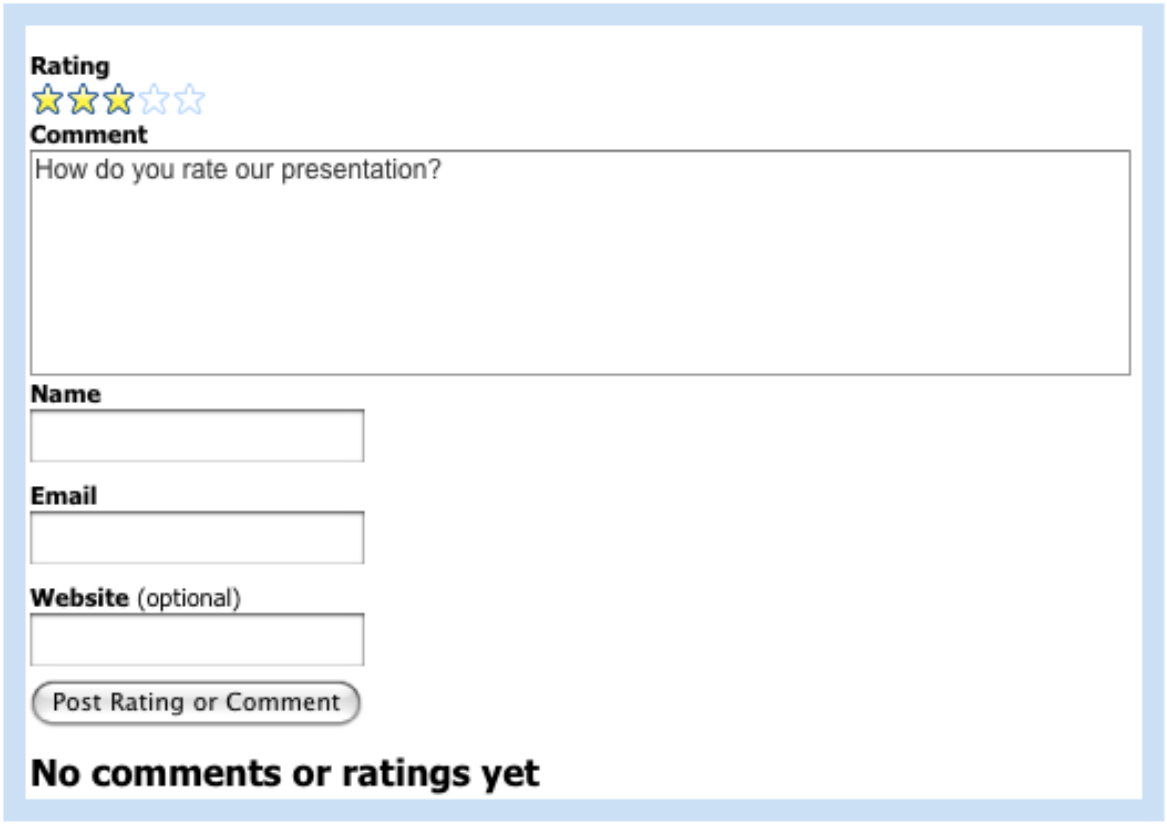


Allow comments?
: Enable or disable comments from the visitor.

Copyright 1993-2009 Day Management AG

Default Message
You can enter a default message to indicate what they should be rating.

The visitor can click the stars to set their ratings. Depending on your definition the visitor will then be able to leave a comment together with a few basic details about themselves:



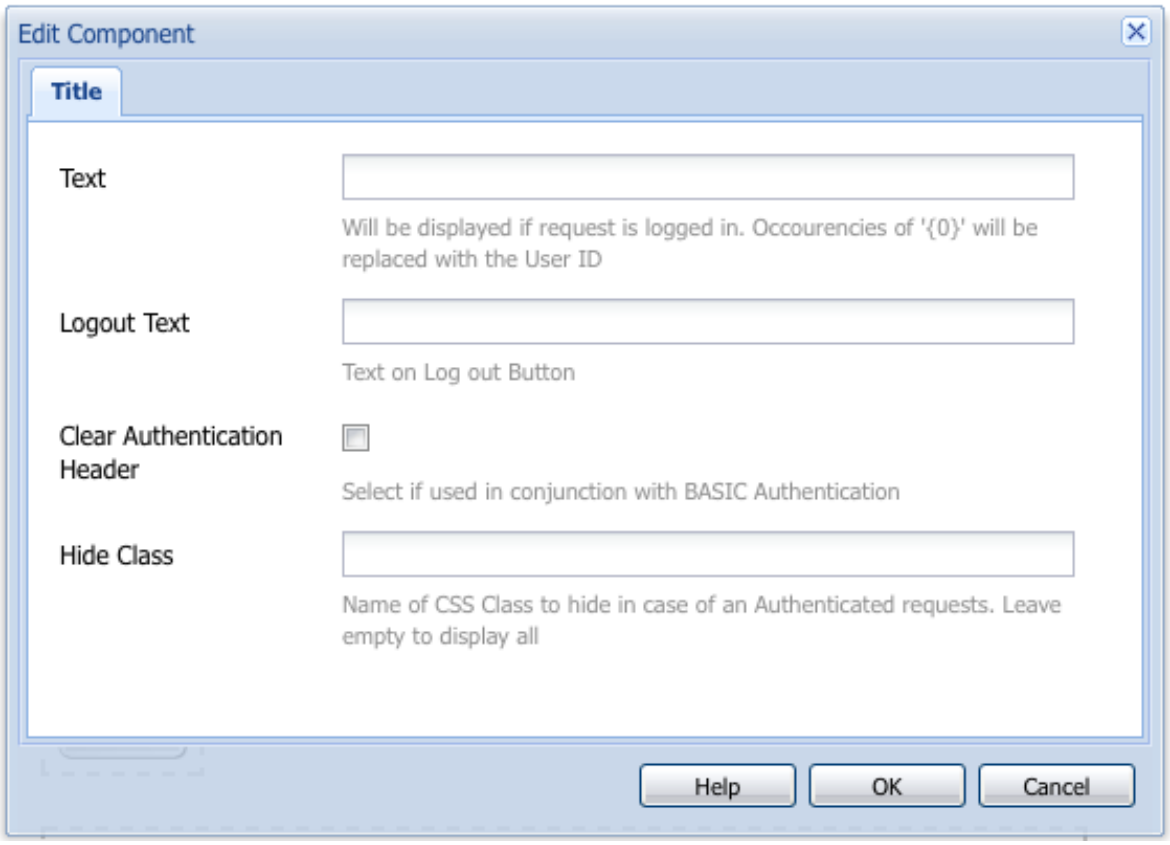
4.2.2.3 Sign out

The Sign out component has two functions:

- shows the account currently logged in
- provides a link that allows you to log out from this account

You can configure various texts and parameters:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG


Edit Component
Title
Text
Will be displayed if request is logged in. Occourencies of '{0}' will be replaced with the User ID
Logout Text
Text on Log out Button
Clear Authentication Header
Select if used in conjunction with BASIC Authentication
Hide Class
Name of CSS Class to hide in case of an Authenticated requests. Leave empty to display all
Help
OK
Cancel

Text
The text to be displayed prior to the account name.

Logout Text
The text to displayed on the logout link.

Clear Authentication Header
Activate if being used in conjunction with BASIC Authentication.

Hide Class
The name of the CSS class to be hidden in the case of authenticated requests. Leave this field empty to display all.

The following example shows the Sign out component used in Geometrixx (with the default parameters as above):

4.2.3 Columns

Columns control the layout of content in CQ WCM.

4.2.3.1 Two (2) Columns

A Column Control component that defaults to 2 equal columns.

4.2.3.2 Three (3) Columns

A Column Control component that defaults to 3 equal columns.

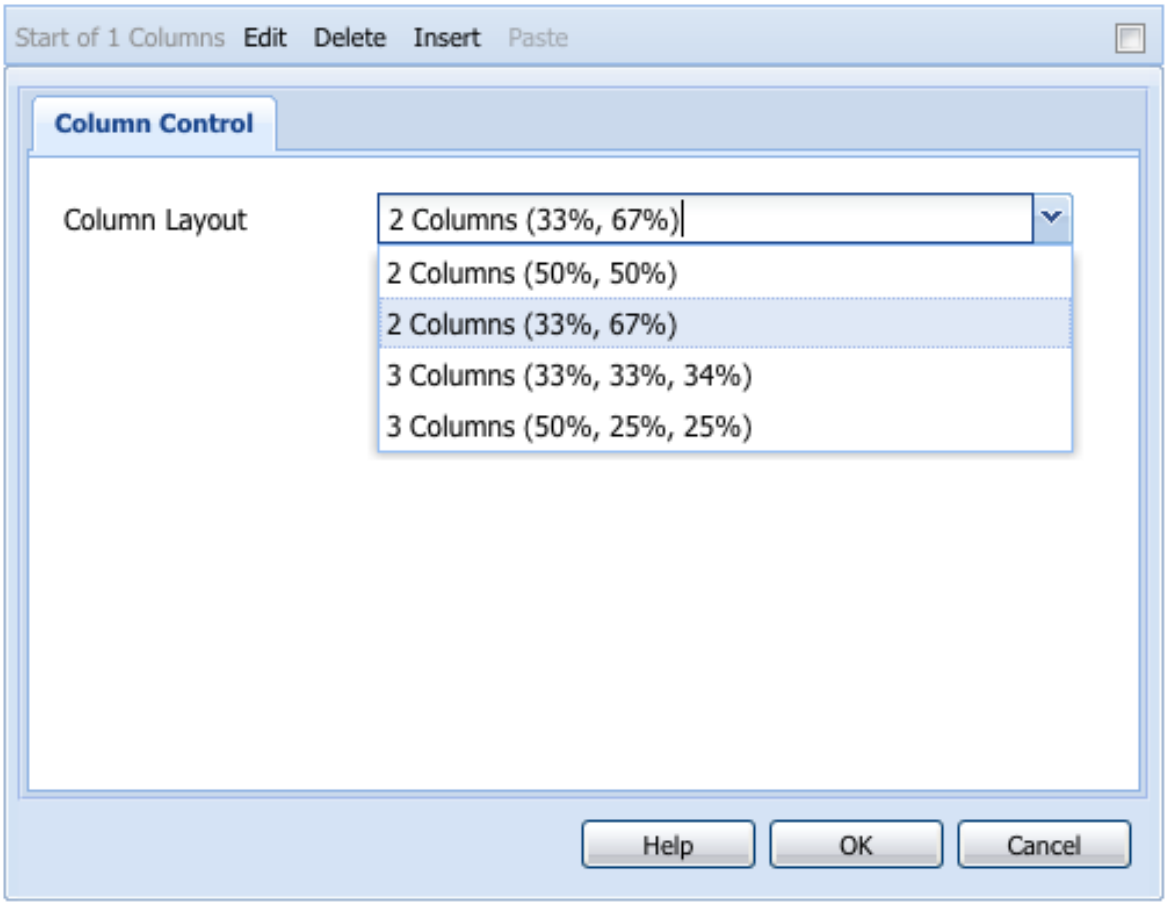
CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

4.2.3.3 Column Control

The Column Control component lets users split the content in the main panel of the web-page into multiple columns. Users specify the number of columns and then create, delete, or move content within each of the columns.

Note

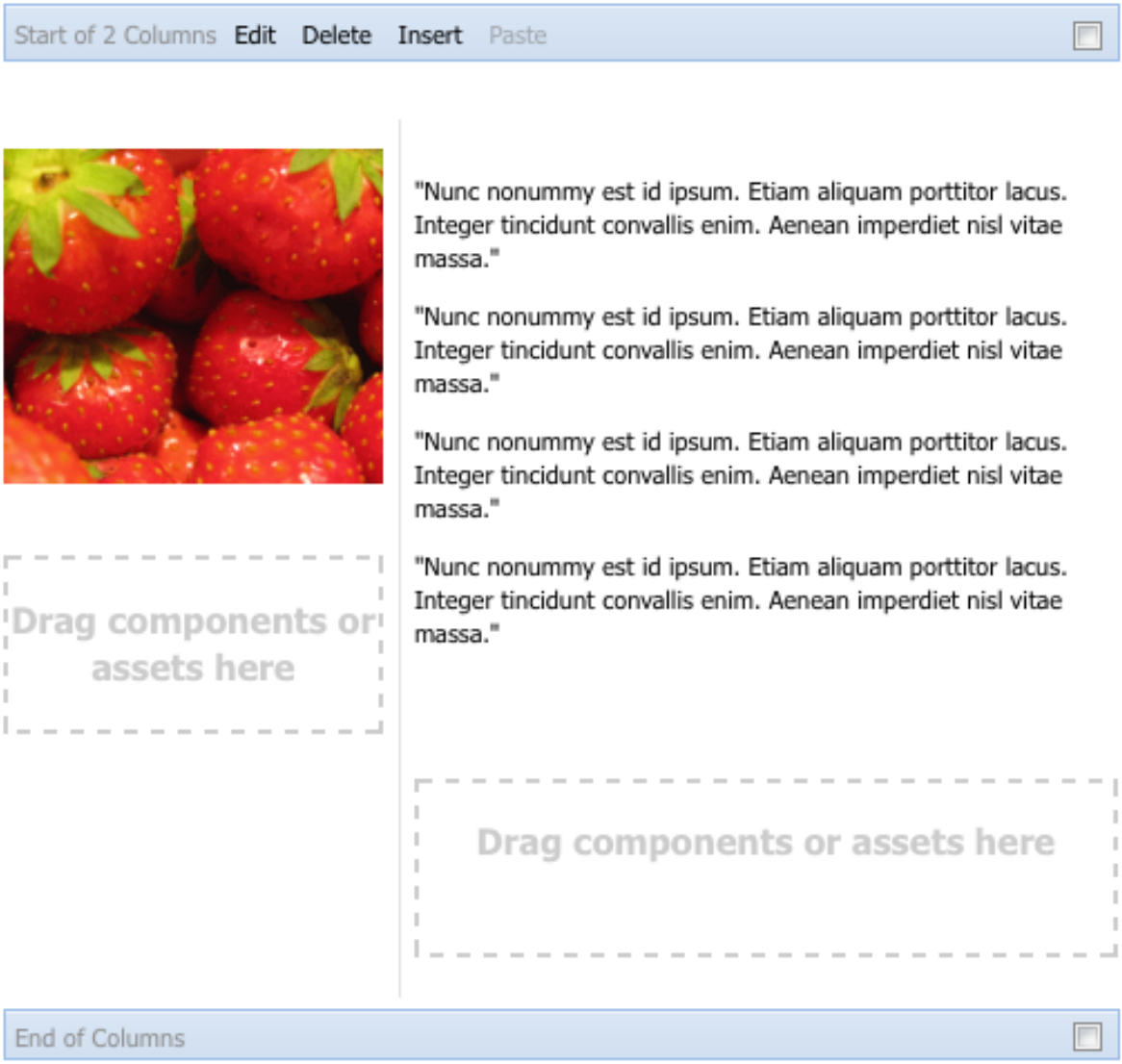
The additional components 2 Columns and 3 Columns default to the appropriate number of columns for ease of use.



Column Layout
: Select the number of columns you want rendered. Once created, each column has its own **`Drag components or assets here`** link for adding content.

The following example shows the Column Control component ready for use in Geometrixx. You can now use the placeholders for new components:

Copyright 1993-2009 Day Management AG


Start of 2 Columns Edit Delete Insert Paste
"Nunc nonummy est id ipsum. Etiam aliquam porttitor lacus. Integer tincidunt convallis enim. Aenean imperdiet nisl vitae massa."
"Nunc nonummy est id ipsum. Etiam aliquam porttitor lacus. Integer tincidunt convallis enim. Aenean imperdiet nisl vitae massa."
"Nunc nonummy est id ipsum. Etiam aliquam porttitor lacus. Integer tincidunt convallis enim. Aenean imperdiet nisl vitae massa."
"Nunc nonummy est id ipsum. Etiam aliquam porttitor lacus. Integer tincidunt convallis enim. Aenean imperdiet nisl vitae massa."
Drag components or assets here
Drag components or assets here
End of Columns

4.2.4 Form

Form components are used to create forms for visitors to submit input. They are built up from several different components:

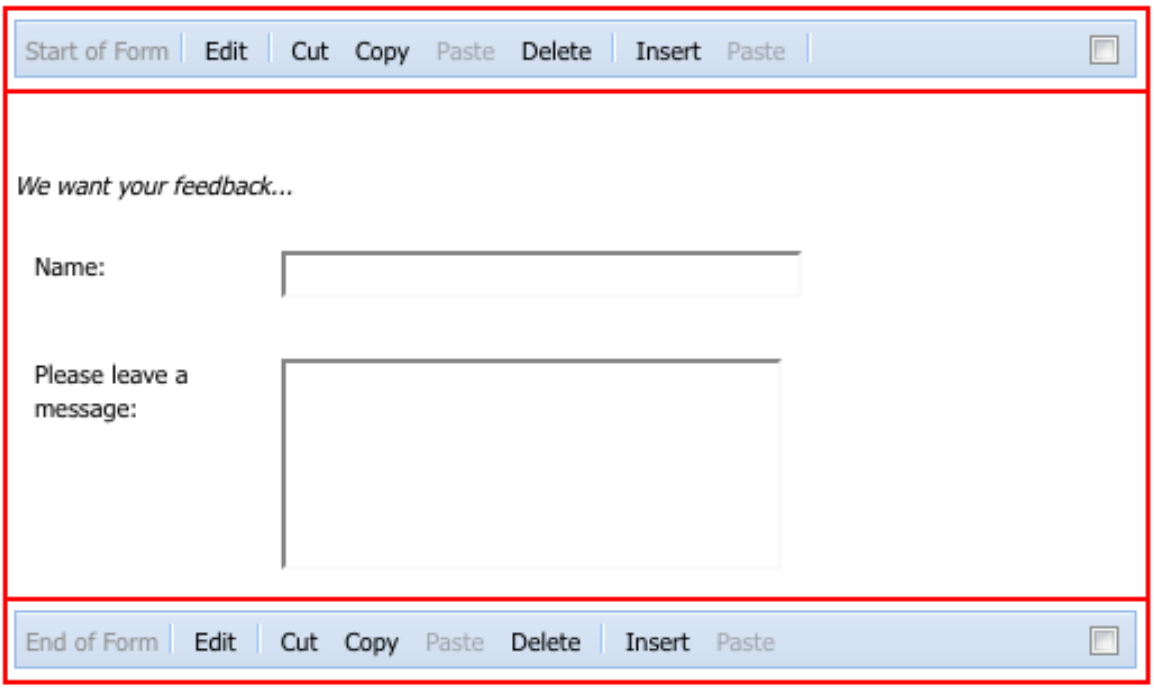
Form
: The form component defines the beginning and end of a new form on a page. Other components can then be placed in between these elements, such as tables, downloads, and so on. See Form.

Form fields and elements
: Form fields and elements can include text boxes, radio buttons, images, and so on. The user often completes an action in a form field, such as typing text. See individual form elements for more information.

  `Profile` components relate to visitor profiles used for social collaboration and other areas where visitor personalization is required.

The following example shows an example form in Geometrixx. It is comprised of the **`Form`** component (start and end), with two **`Form Text Fields`**, and also one general **`Text`** field used for the lead-in text.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



4.2.4.1 Common Form Fields

Although each of the form elements have different purposes, many are composed of one or more of the following options:

Title and Text
: Includes basic information, such as the title of the form and any accompanying text.

Initial Values
: Includes a default value if specified and the load path.

Constraints
: Indicates whether a field is required and what constraints are on that field (for example, must be numeric, and so on).

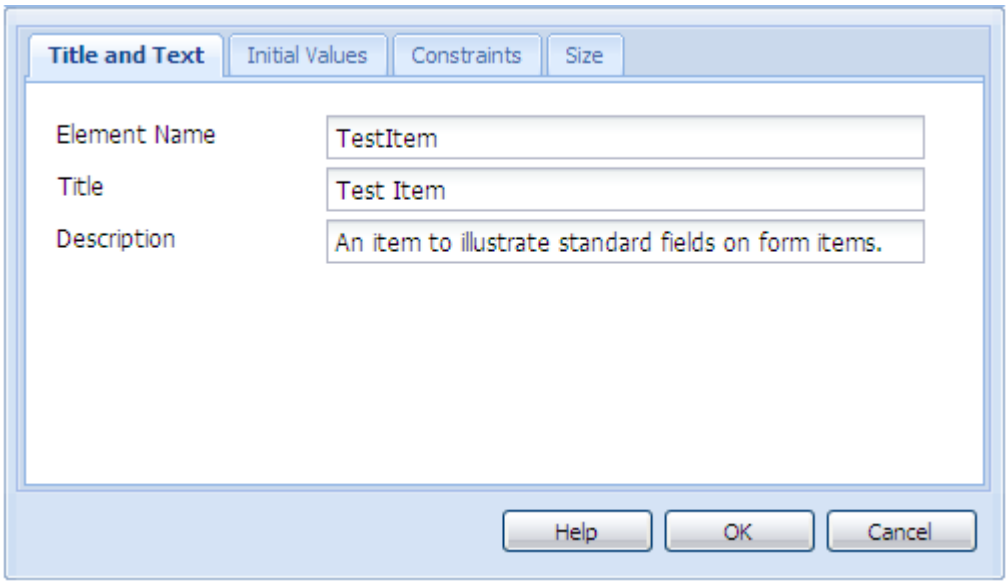
Size
: Indicates the size of the fields.

Note

The fields you see vary *widely* depending on the element. Not all options are available to all components.

Copyright 1993-2009 Day Management AG

4.2.4.1.1 Title and Text



Note

Additional fields may be available, dependent on the individual component.

Element Name
: Name of the form element.

  This is a required field and should only contain the following characters:

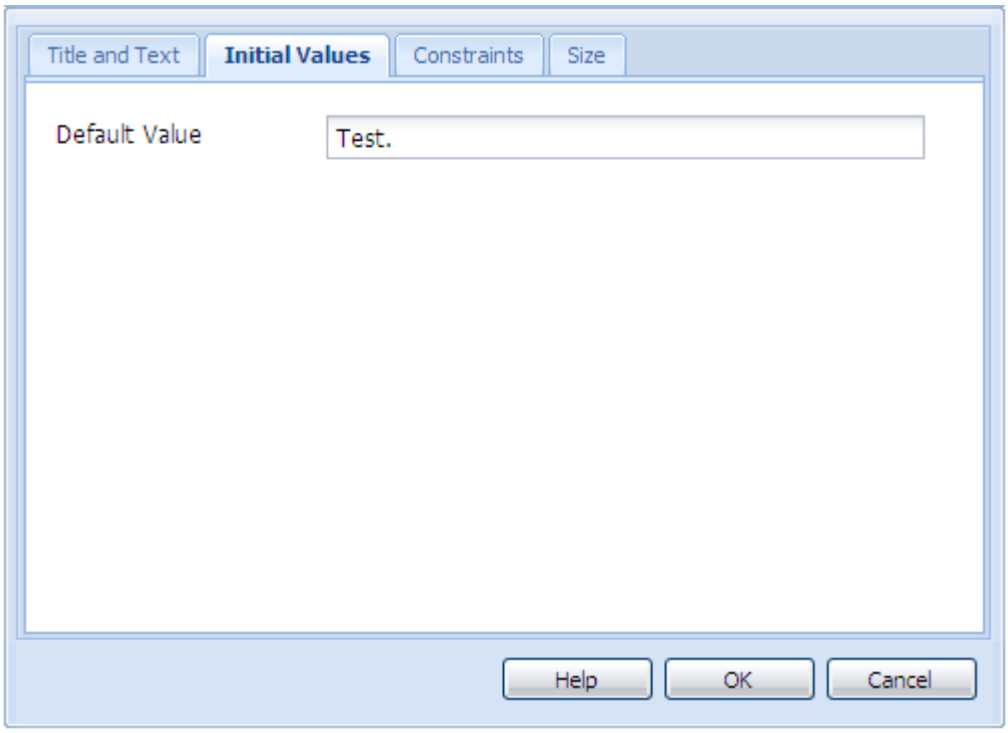
  - alphanumeric characters
  - `_ . / : -`

Title
: Changes the default title of the element.

Description
: Provide additional information, if necessary. This description does not display in the form. Use it as help text for the user.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

4.2.4.1.2 Initial Values

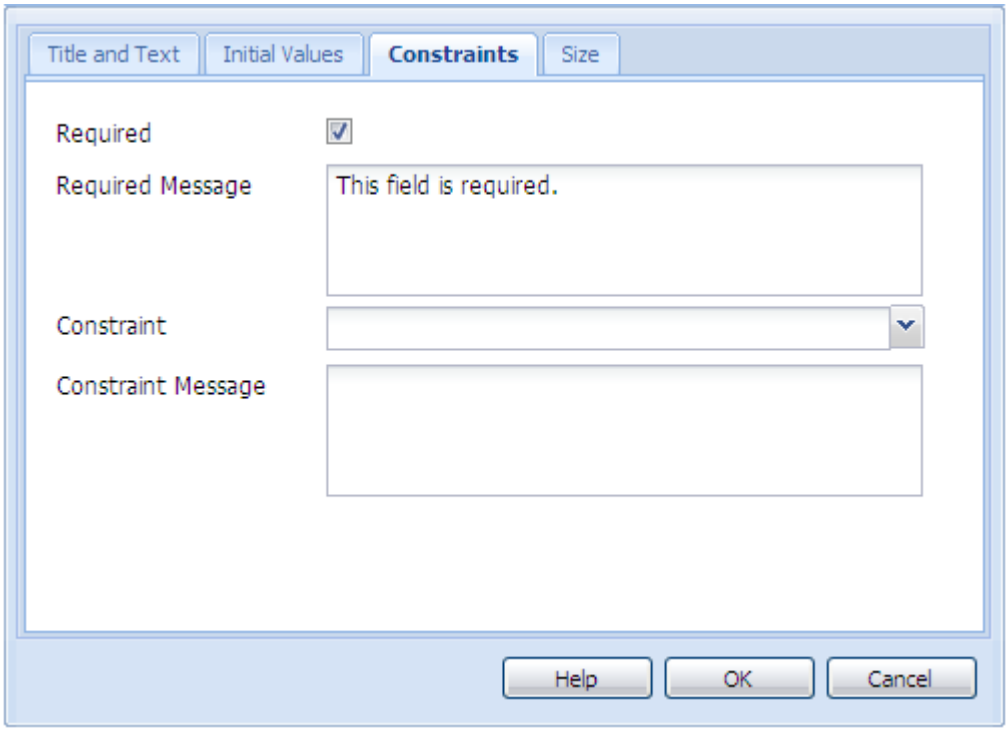


Default Value
: The values displayed by default in this field.

4.2.4.1.3 Constraints

The constraints are appropriate to the individual component, but can indicate whether:

- input is required
- constraints are to be applied to the input

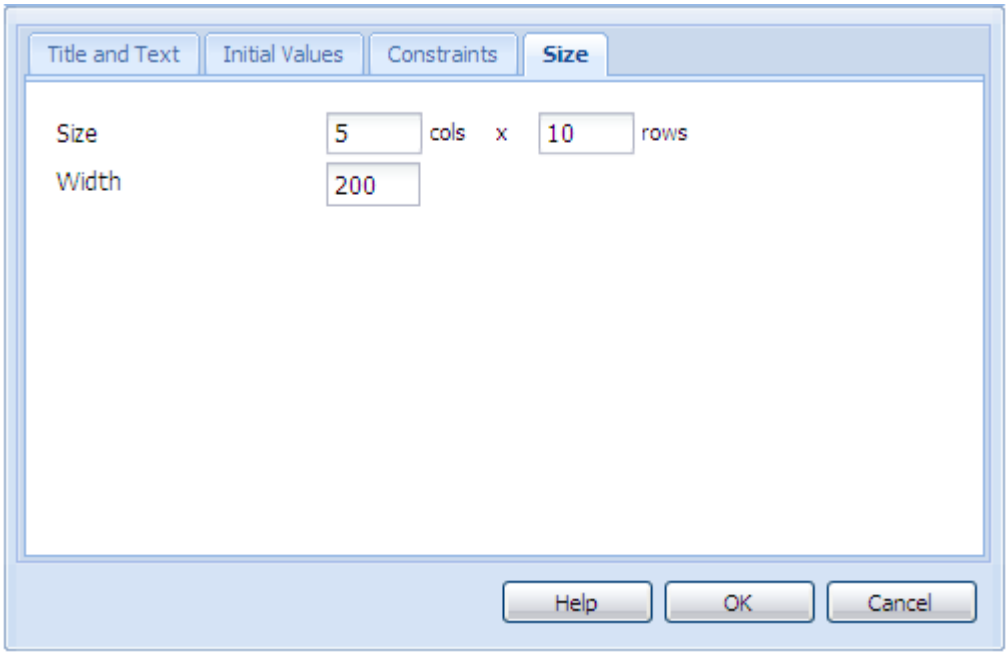


Copyright 1993-2009 Day Management AG

4.2.4.1.4 Size

Again the size parameters available depend on the individual component, but can indicate:

- columns and row
- dimensions in pixels



4.2.4.2 Checked Password Field

This component gives you two fields for:

- the input of a password
- a check to confirm that the password has been input correctly

With default settings the component will appear as follows:

The component is configured for immediate use, but you can change the configuration if required. Leaving fields empty will use default settings.

4.2.4.3 Combined Sign-in Sign-up

This component gives you fields for:

- the input of a login account name
- the input of a password
- radio check boxes to indicate whether you want to log in to an existing account, or create a new account

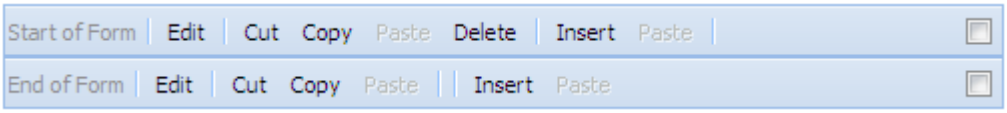
With default settings the component will appear as follows:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

The component is configured for immediate use, but you can change the configuration if required. Leaving fields empty will use default settings.

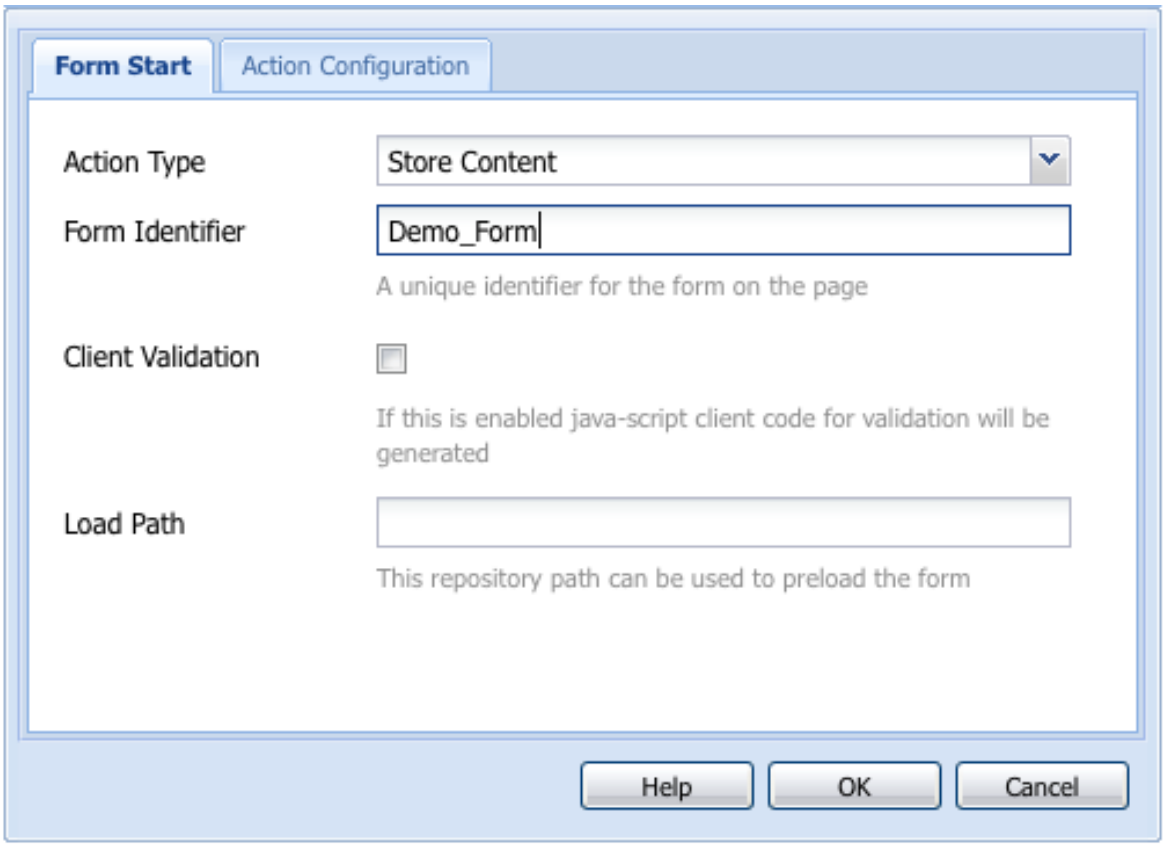
4.2.4.4 Form

The Form component defines both the start and end of a form using the **`Form Start`** and **`Form End`** components. These are always paired to ensure that the form is correctly defined:



4.2.4.4.1 Start of Form

This component is needed to define the start of a new form on a page.



Action Type
: Determines which form action is triggered (similar to "action=" in HTML) Action types include the following (though they may have been extended with customized actions in your CQ instance):

- Mail: Sends the form contents to an email address that you specify.

Copyright 1993-2009 Day Management AG

- Newsletter: Use if the form is used for newsletter registration.
- Profile Update: Updates the profile.
- Reset Password: Use if the form is used for password reset requests.
- Create and Update Account: Creates and/or updates the account details.
- Store Content: Stores the contents of the form into the repository at the given path. Therefore the content path field should contain a path in the repository. The path should end with "/" which means that for each form post a new node is created at the given location (example: `/forms/feedback/`)

Form Identifier
: Use the form identifier if several forms are used on a single page. The form identifier can uniquely identify the form.

Client Validation
: Indicates whether client validation is required for this form. This can be achieved in conjunction with the **`Forms Captcha`** component.

Load Path
: The load path for any content that the form requires.

The options available in **`Action Configuration`** are dependent on the **`Action Type`** selected:

- **`Create and Update Account`**

  Initial Group
  : Group to assign the new user to.

  Home
  : Page to display upon successful login.

  Thank you Page
  : The page to be referenced for thanking the visitor for their input.

- **`Mail`**

  From
  : Enter the email address that the email should come from.

  Mailto
  : Enter the email address of the person to send the form to.

  Subject
  : Enter a subject for the email.

  Redirect URL
  : The redirect path points to a page that is invoked when a form is successfully submitted.

- **`Newsletter`** - needs no action configuration.

- **`Profile Update`** and **`Reset Password`**

  Thank you Page
  : The page to be referenced for thanking the visitor for their input.

- **`Store Content`**

Copyright 1993-2009 Day Management AG

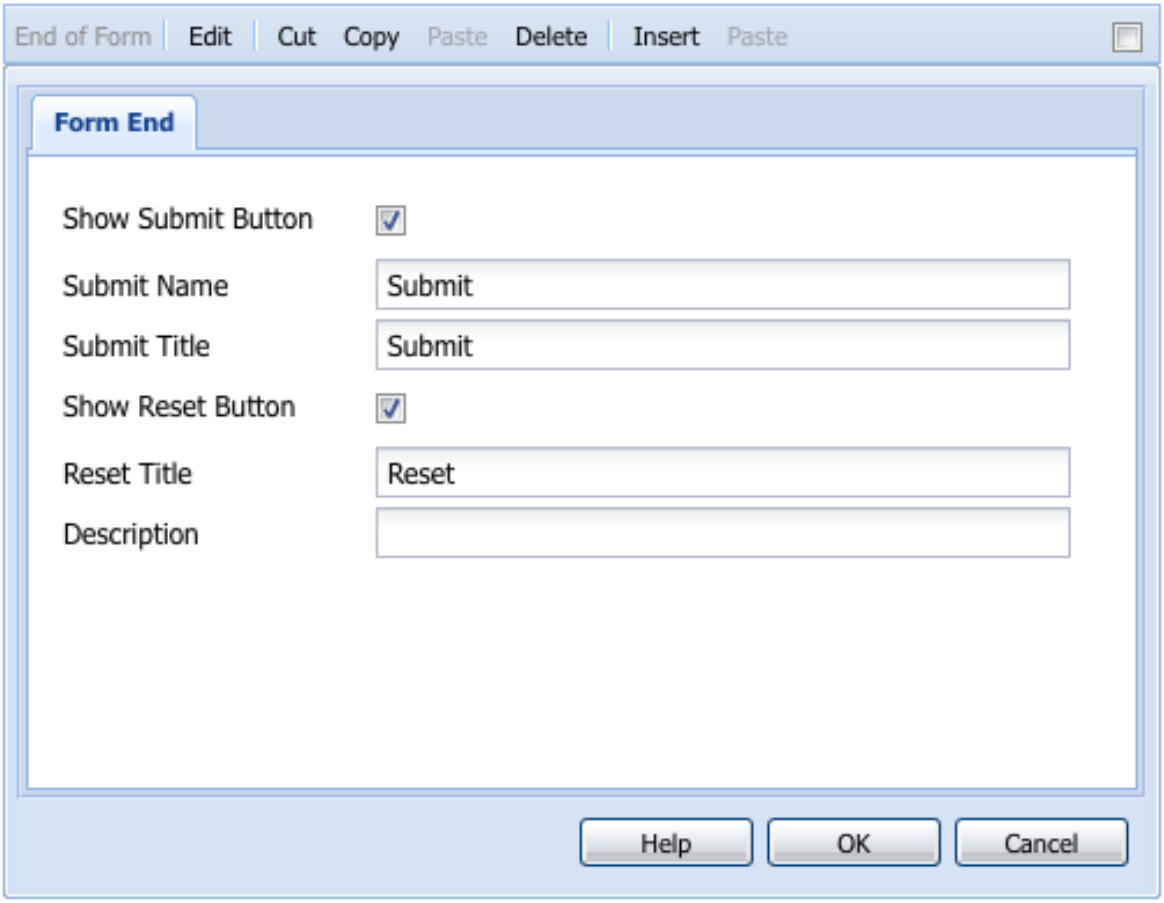
Content Path
: The content path for any content that the form dumps. Enter a path that ends with a slash /. The slash means that for each form post, a new node is created at the given location (for example, /forms/feedback/).

Redirect URL
: The redirect path points to a page that is invoked when a form is successfully submitted.

Show Report
: Click this button to access the information about form results in the bulk editor. From here, you can export the information to an Excel .tsv (tab-separated) spreadsheet.

4.2.4.4.2 End of Forms

This marks the end of the form and creates a **`Submit`** button. You can specify an additional Submit button identifier (which you need if you have several **`Submit`** buttons on the form), the title of the submit button, and an optional **`Reset`** button, including its title.



Show Submit Button
: Indicates whether a Submit button should be shown or not.

Submit Name
: An identifier if you are using multiple submit buttons in a form.

Submit Title
: The name that appears on the button, such as **`Submit`** or **Send**.

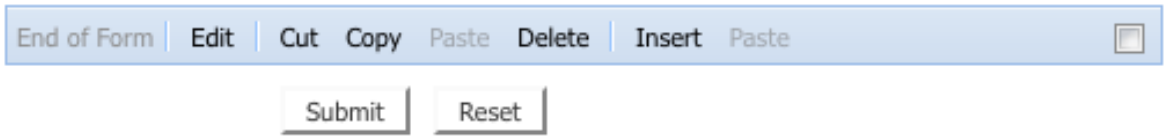
Show Reset Button
: Select check box to make the **`Reset`** button visible.

Copyright 1993-2009 Day Management AG

Reset Title
The name that appears on the **Reset** button.

Description
Information that appears below the button.

The following example shows use of a Form End in Geometrixx:



4.2.4.5 Forms Address Field

This allows you to input an international address field with the following format:

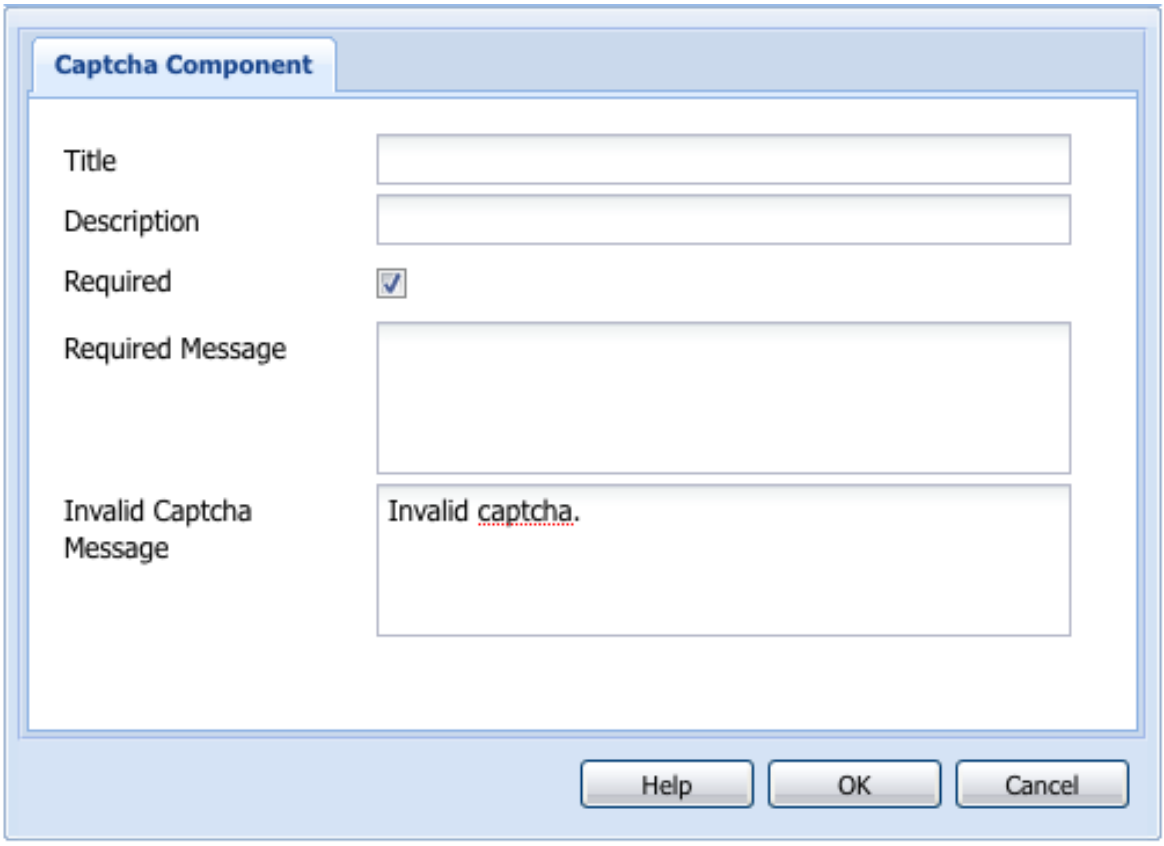
The component is configured for immediate use, but you can change the configuration if required. Leaving fields empty will use default settings.

4.2.4.6 Forms Captcha

The Captcha component requires the user to type in an alphanumeric string as displayed on screen. The string changes with each refresh.

You can configure various parameters for this component:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Title
A title for the component.

Description
A description.

Required
Indicates whether user input is required.

Required Message
The message used to indicate to the user that input is required.

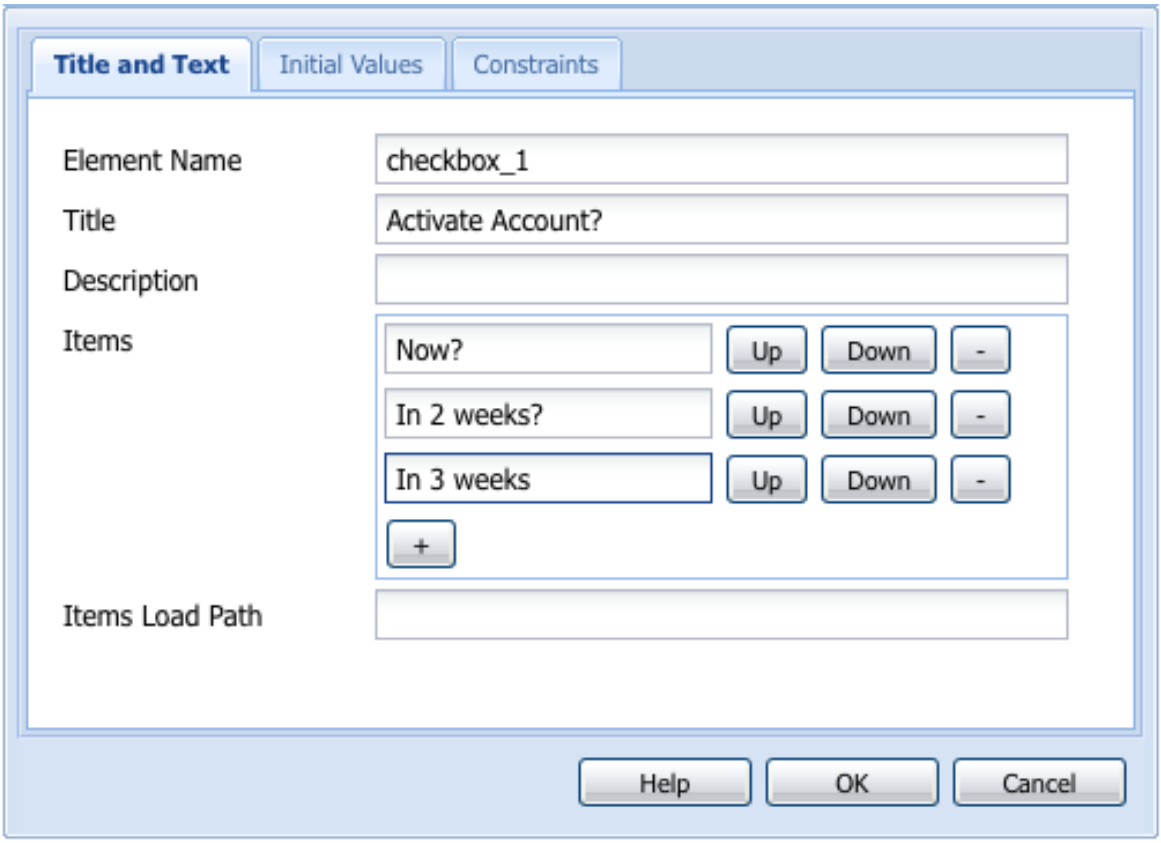
Invalid Captcha Message
The message used to indicate to the user that the input was incorrect and therefore invalid.

4.2.4.7 Forms Checkbox Group

A checkbox allows you to build a list of one of more checkboxes, several of which may be selected at the same time.

You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons.

Copyright 1993-2009 Day Management AG

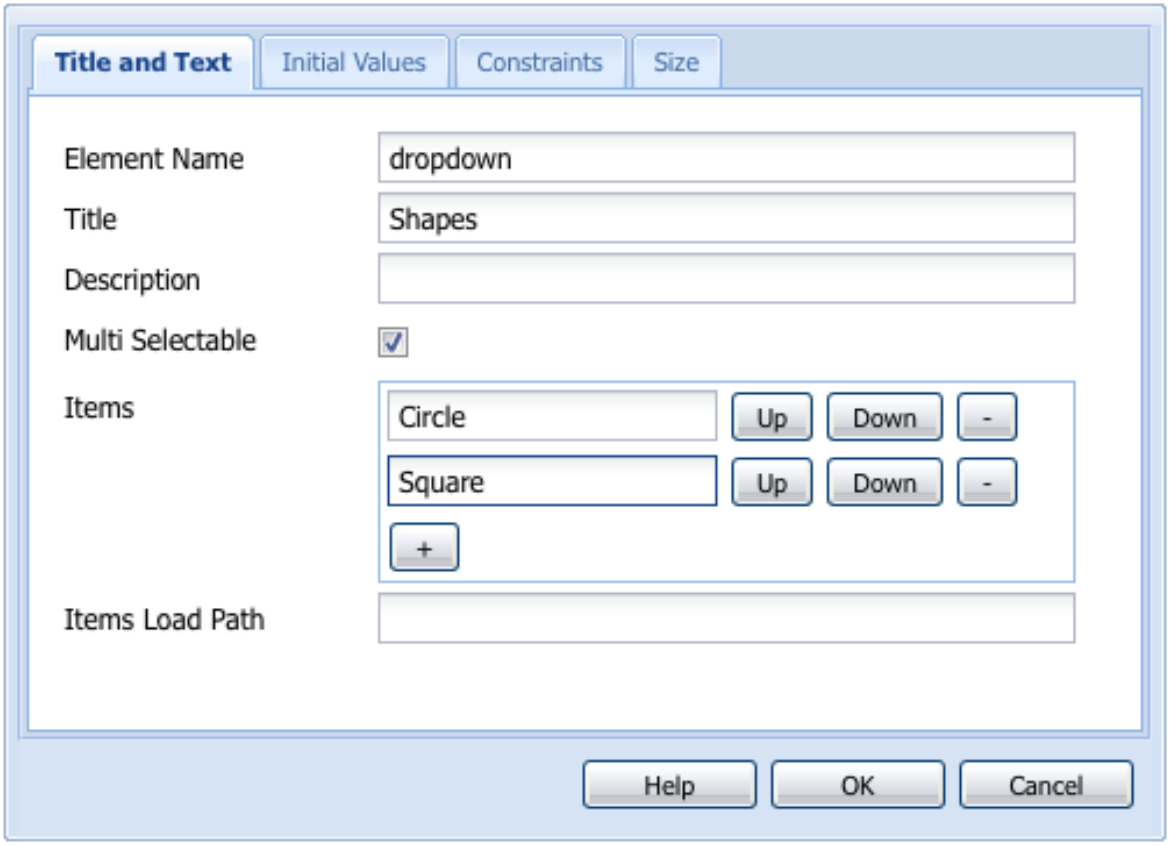


4.2.4.8 Forms Dropdown List

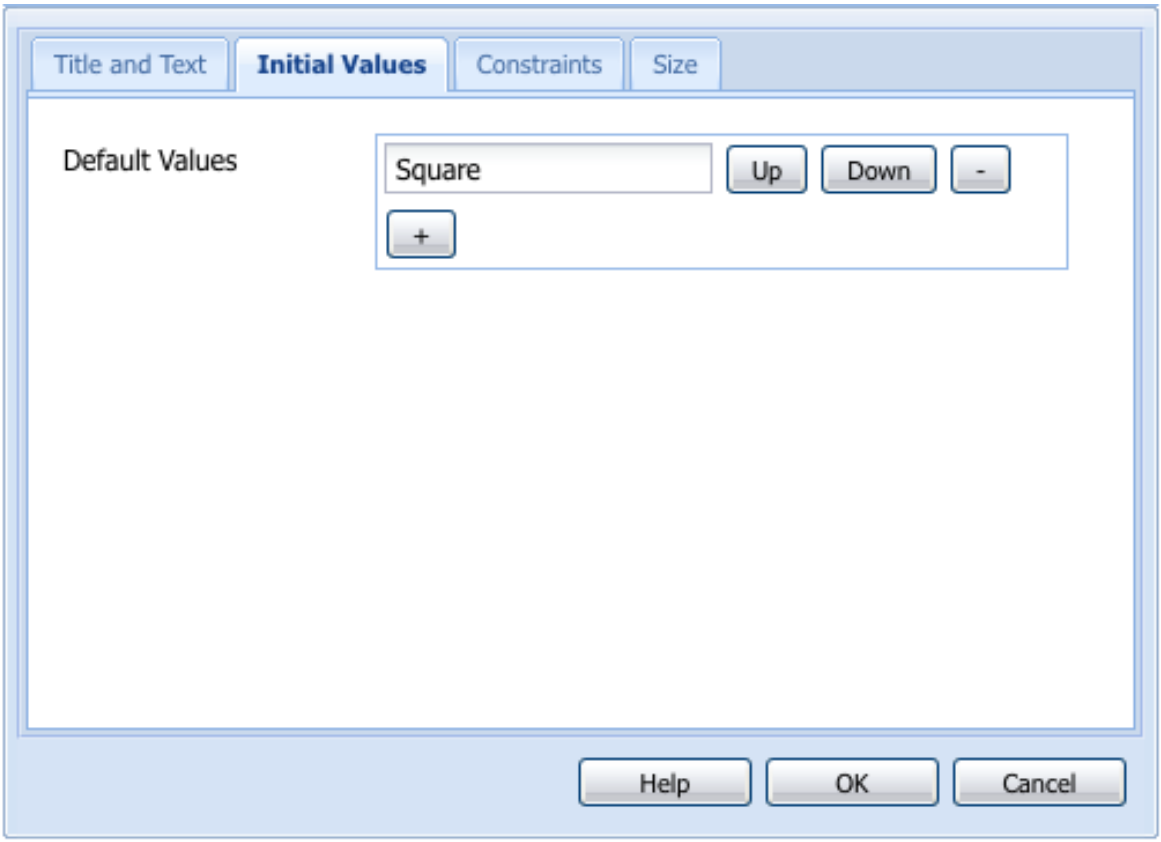
A drop down list can be configured with your range of values for selection.

You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons. You can also allow the users to select several items from the list.

Copyright 1993-2009 Day Management AG

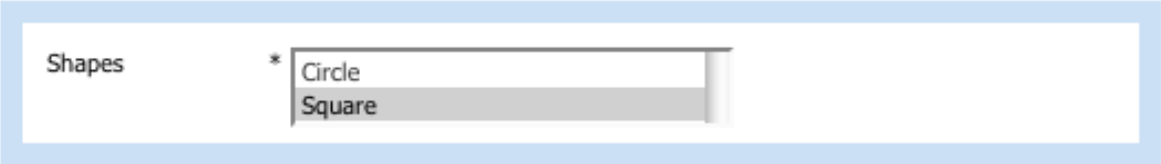


Then you can specify the default value:



Which will be selected when the list is first opened:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



4.2.4.9 Forms File Upload

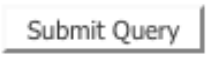
The file upload component provides the user with a mechanism for selecting and uploading a file.

4.2.4.10 Forms Hidden Field

This component allows you to create a hidden field, which may be used for various purposes.

4.2.4.11 Forms Image Button

An image button allows you to create a button with your own text and/or image:



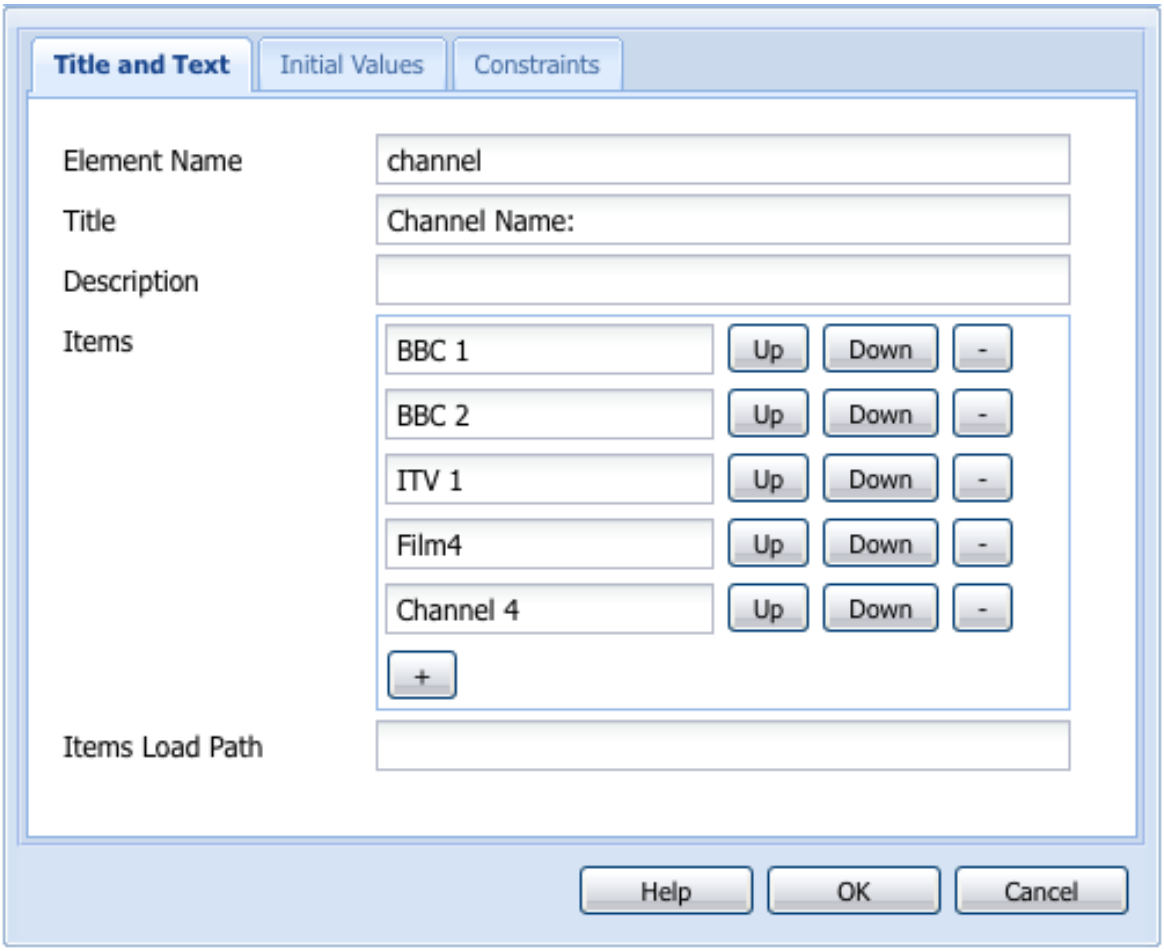
4.2.4.12 Forms Password Field

This can be used when the user must input their password:

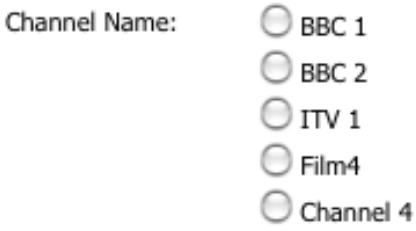
4.2.4.13 Forms Radio Group

A radio group provides you with a list of one of more radio checkboxes, only one of which may be selected at any particular time.

Copyright 1993-2009 Day Management AG



You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons.



4.2.4.14 Forms Submit Button

This component allows you to create a submit button, with your own text:

4.2.4.15 Forms Text Field

Here you can configure a text field, of one or more lines, with your own lead in message:

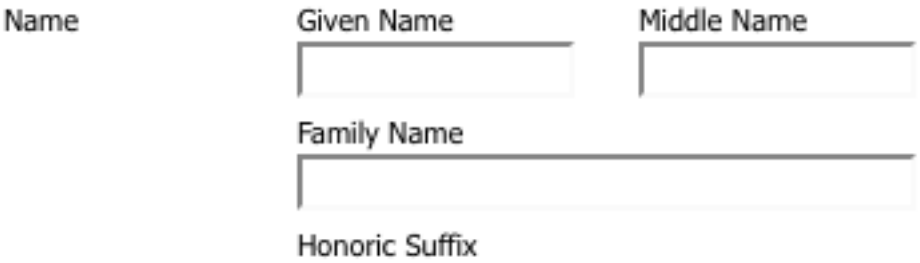
Copyright 1993-2009 Day Management AG

4.2.4.16 Profile Avatar Photo

This component provides the user with a mechanism for selecting and uploading an Avatar Photo file.

4.2.4.17 Profile Detailed Name

This component allows the user to input a detailed name.



4.2.4.18 Profile Display Name

This component allows the user to input a concise name for display purposes.

4.2.4.19 Profile E-Mail

This component allows the user to input an email address.

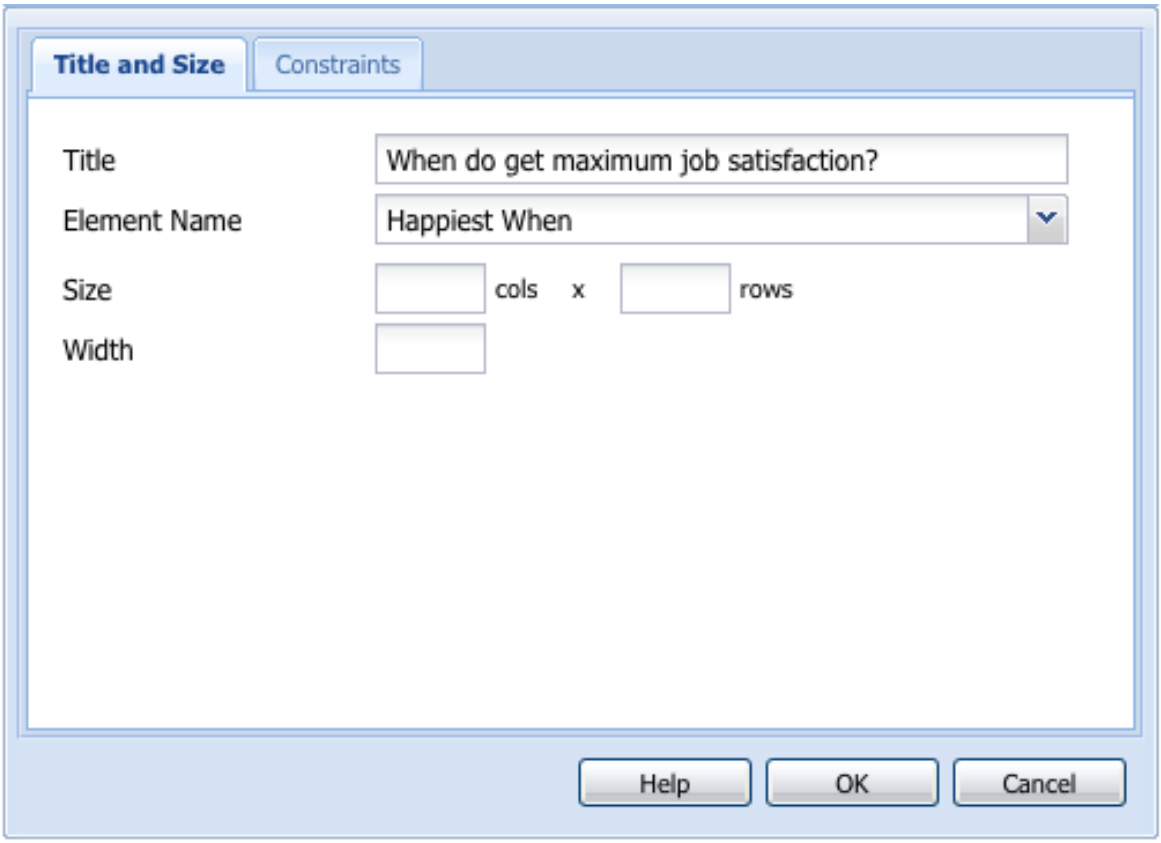
4.2.4.20 Profile Gender

This component allows the user to specify their gender, or indicate that they do not wish to disclose it.

4.2.4.21 Profile General Text Property

This component allows the user to input a value for a profile property. You can select the property **`Element Name`** from a dropdown list:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



The user can then input their value:

4.2.4.22 Profile Primary Phonenumber

This component allows the user to enter the primary telephone number.

4.2.4.23 Profile Primary URL

This component allows the user to specify a URL.

4.2.4.24 Sign-in

This component allows the user to enter their login details.

Copyright 1993-2009 Day Management AG

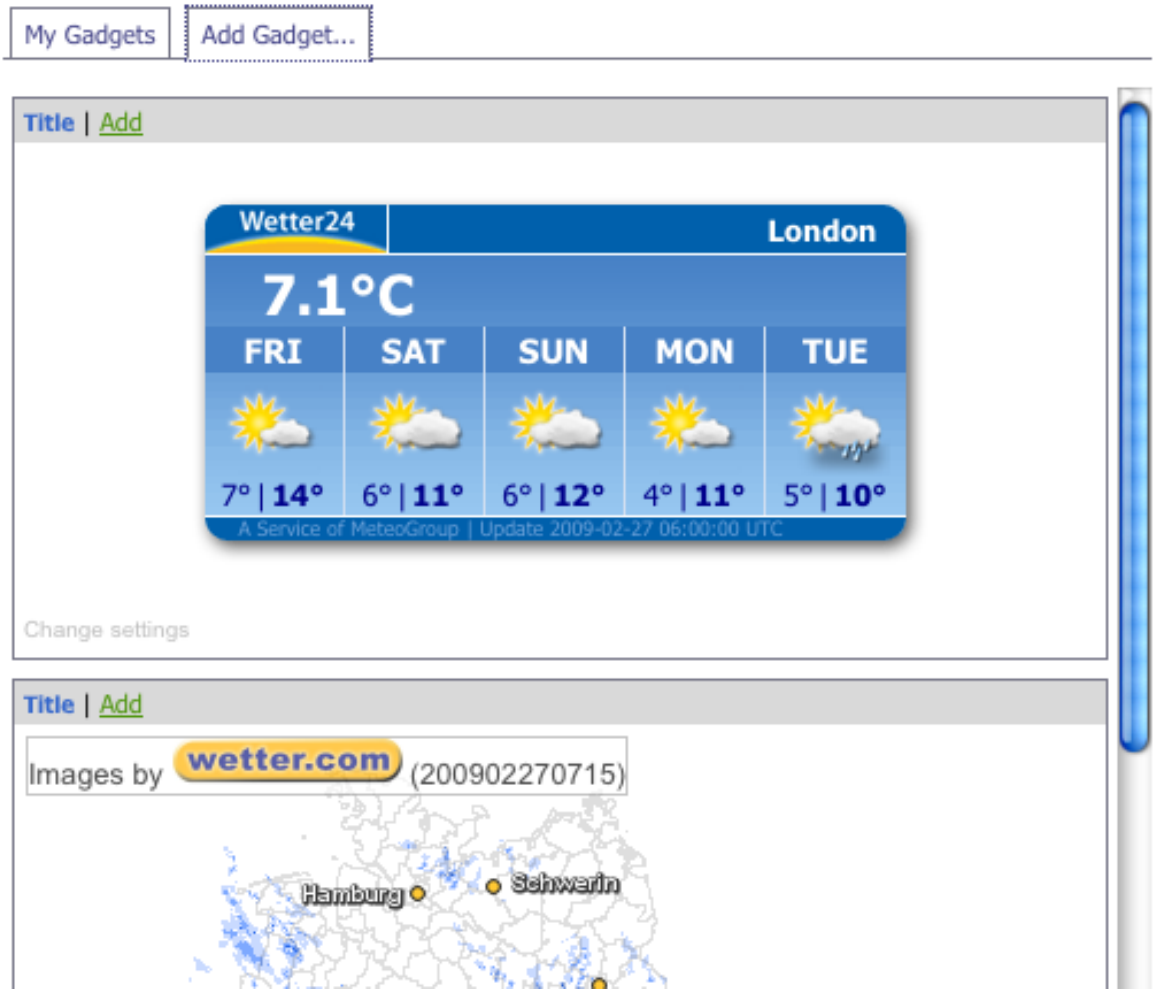
4.2.5 Other

Components in the **`Other`** section include the following:

- Gadgets: Lets you connect into gadgets available on many web sites.
- Search: Lets you create a Search component.
- Tag Clouds: Shows a graphical representation of tags within your web site.
- Teaser: An image designed to entice the visitor to another page.

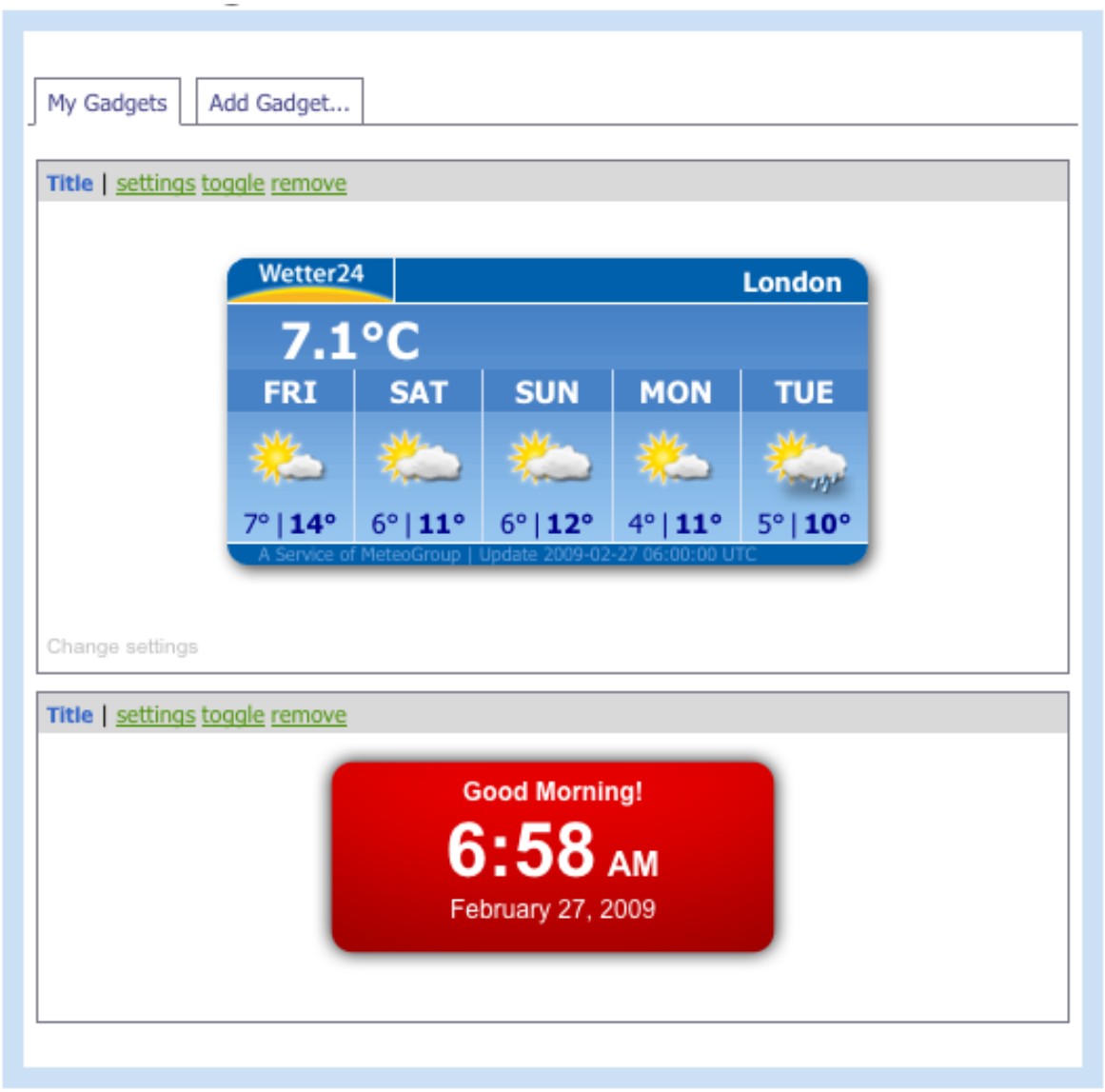
4.2.5.1 My Gadgets

This components lets you select one or more gadgets from those available:



Click **Add** to place the gadget on your page:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



You can then:

settings
: You can edit the individual configuration settings for each gadget.

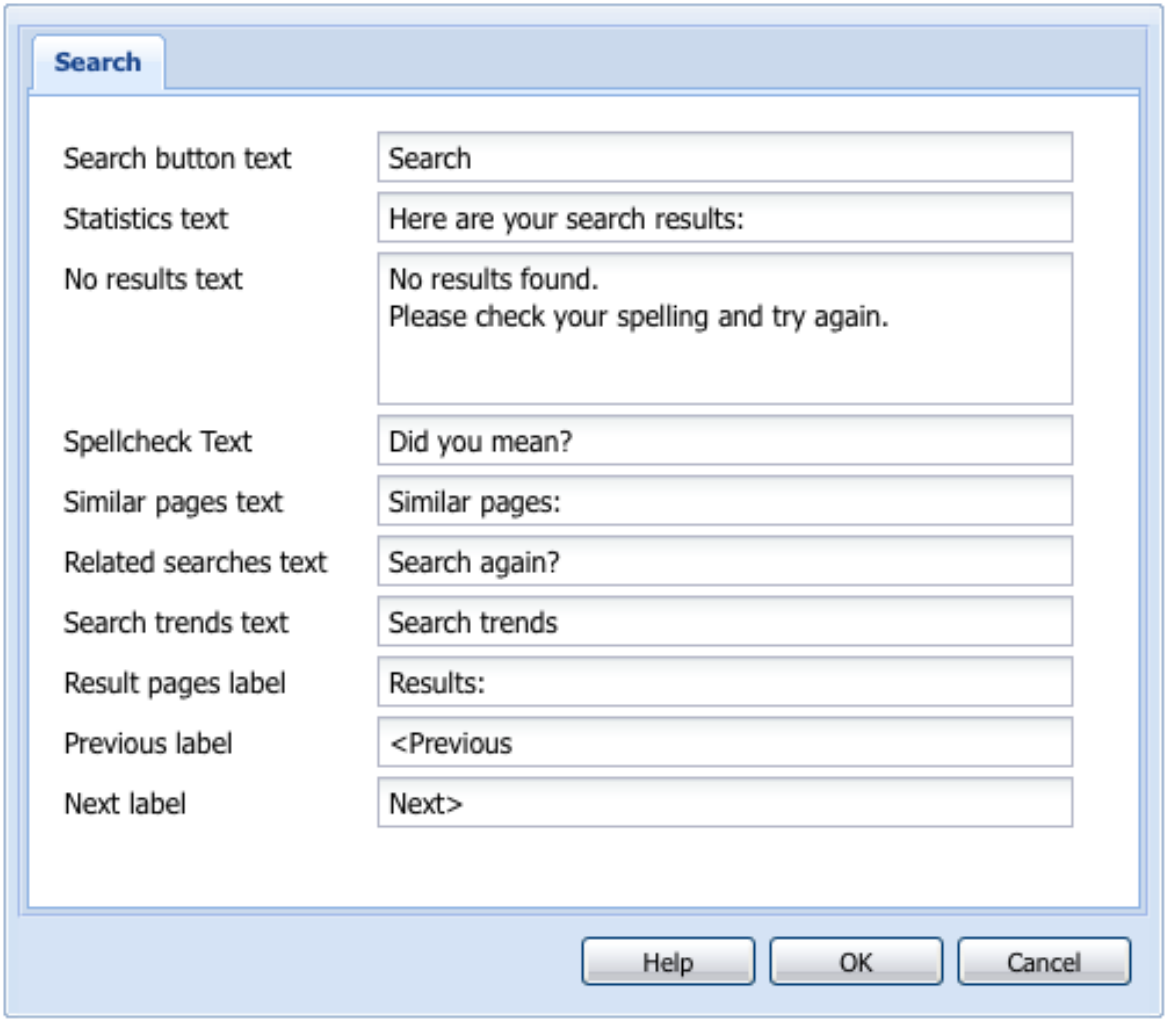
toggle
: Toggle the display of the gadget.

remove
: Remove the gadget from the paragraph.

4.2.5.2 Search

The Search component adds search capability to your page.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Search Button Text
: The name displayed on the actual search button.

Statistics Text
: The text displayed above the search results.

No Results
: If there are no results, the text entered here is displayed.

Spellcheck Text
: If someone enters a similar term, this text is displayed before the term.

  For example, if you type `geometrixxe`, the system displays `Did you mean? geometrixx`

Similar Pages Text
: The text that is displayed next to a result for similar pages. Click this link to see pages that have similar content.

Related Searches Text
: The text that appears next to searches for related terms and topics.

Search Trends Text
: The title above the search terms users enter.

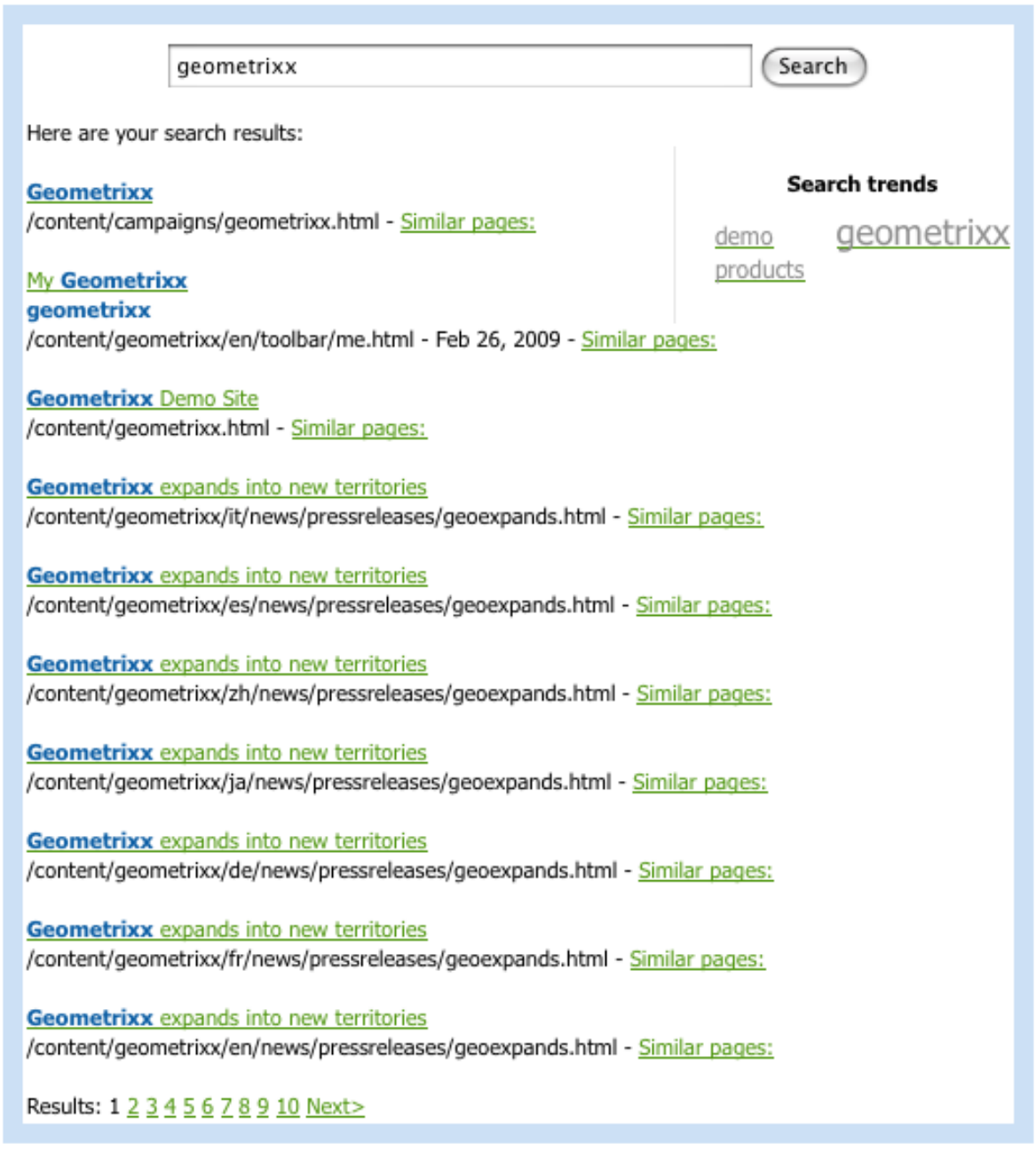
Result Pages Label
: The text that appears at the bottom of this list with links to other results pages.

Copyright 1993-2009 Day Management AG

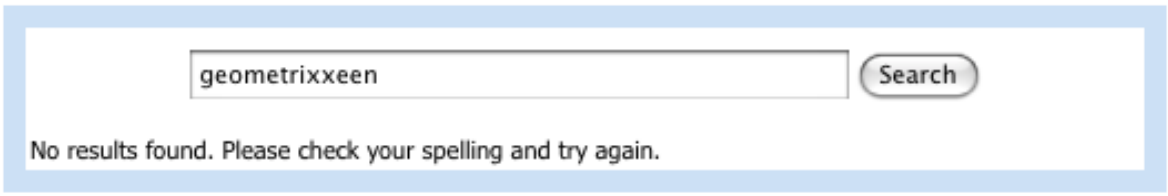
Previous Label
: The name that appears on the link to previous search pages.

Next Label
: The name that appears on the link to subsequent search pages.

The following example shows the Search component in Geometrixx after a search for the word *geometrixx*:



The following examples shows a search term that is misspelled and not available on the Geometrixx site:



Copyright 1993-2009 Day Management AG

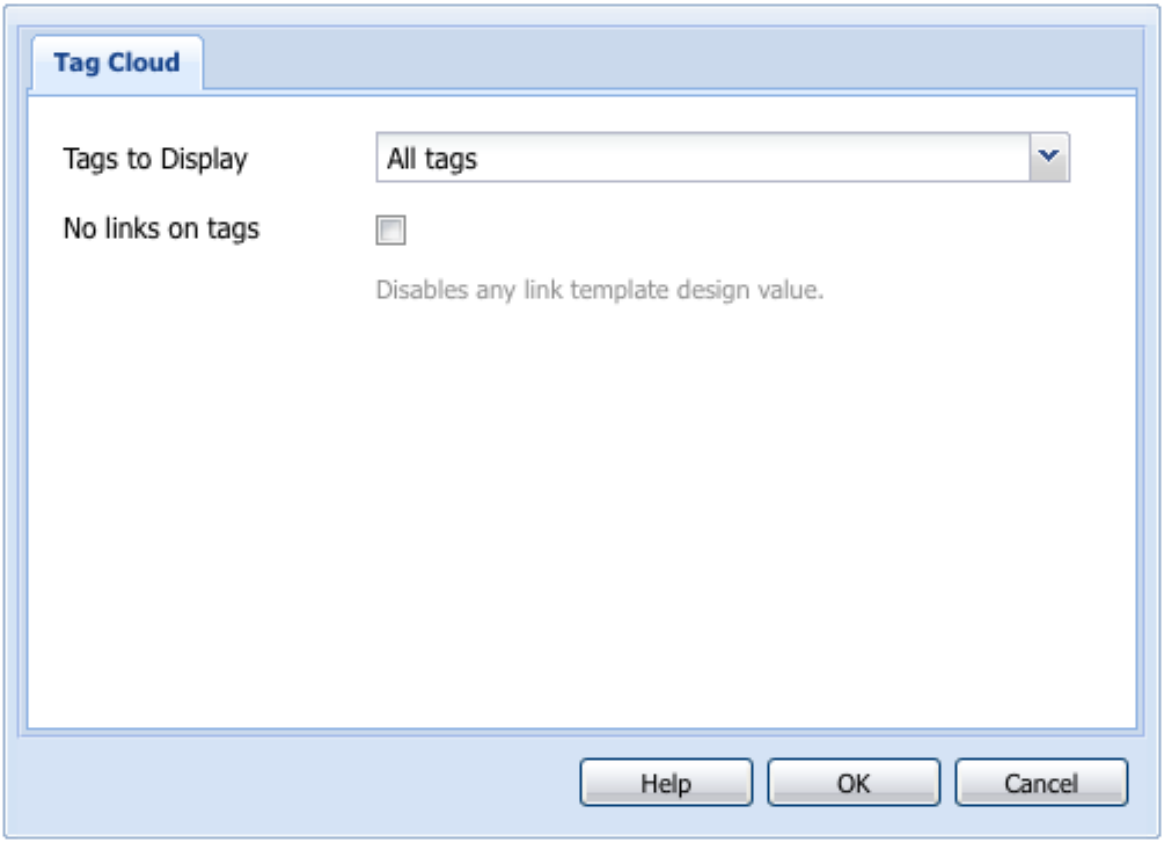
4.2.5.3 Tag Cloud

A tag cloud shows a graphically presented selection of the tags within your website:

When configuring this, you can specify:

Tags to Display
: Where the tags to be displayed are collected from. Either the current page or all tags.

No links on tags
: Whether the tags displayed should act as links.

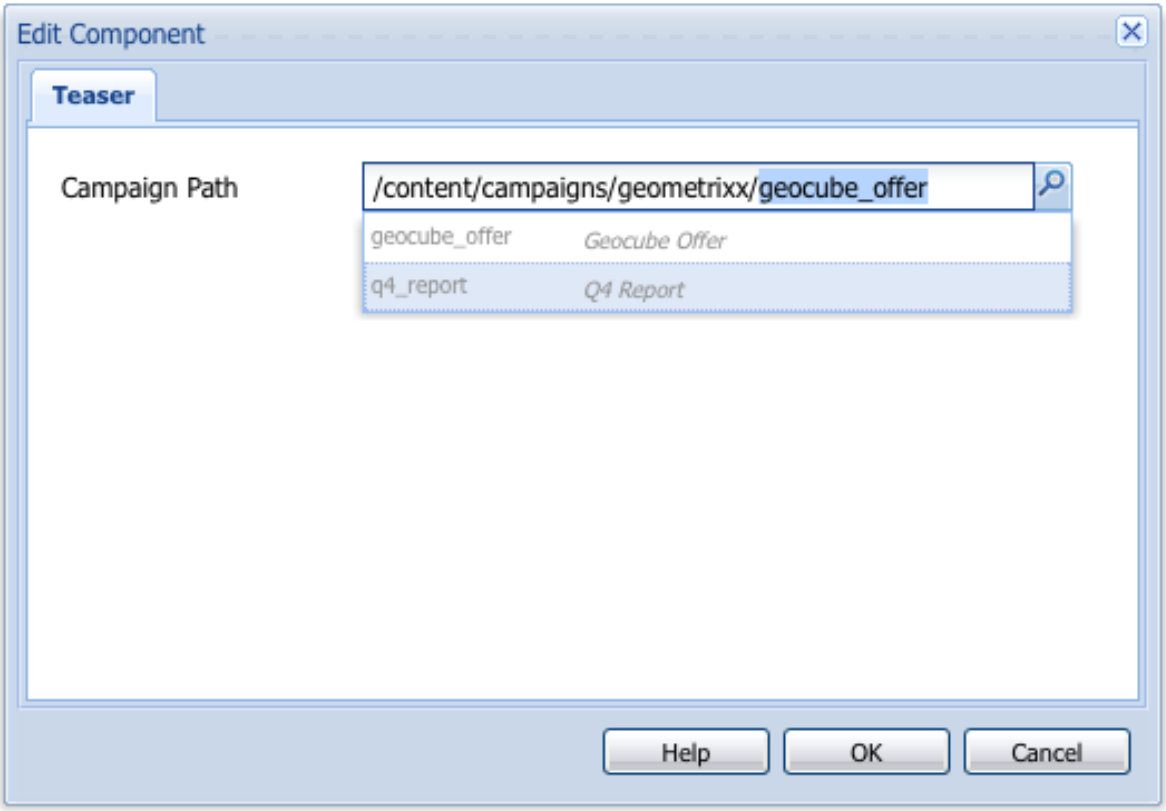


4.2.5.4 Teaser

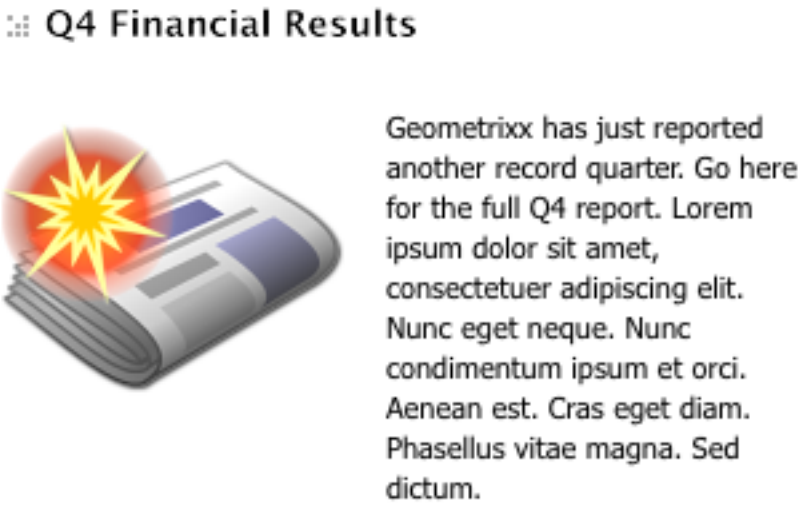
A Teaser is a piece of content (usually an image) displayed on a main page to "tease" users into accessing the underlying content, which is defined as a campaign.

You can define the campaign that the teaser should lead to:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



The teaser then displays the defined text and image:


Q4 Financial Results
Geometrixx has just reported another record quarter. Go here for the full Q4 report. Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Nunc eget neque. Nunc condimentum ipsum et orci. Aenean est. Cras eget diam. Phasellus vitae magna. Sed dictum.

4.3 Geometrixx Components Available in Design Mode

In addition to the standard components that authors can access through the sidekick, various components are used in Geometrixx. Although users cannot add or remove these components from the pages, you can use Design mode to edit various parameters (see the section called "Using Edit, Design, and Preview Modes").

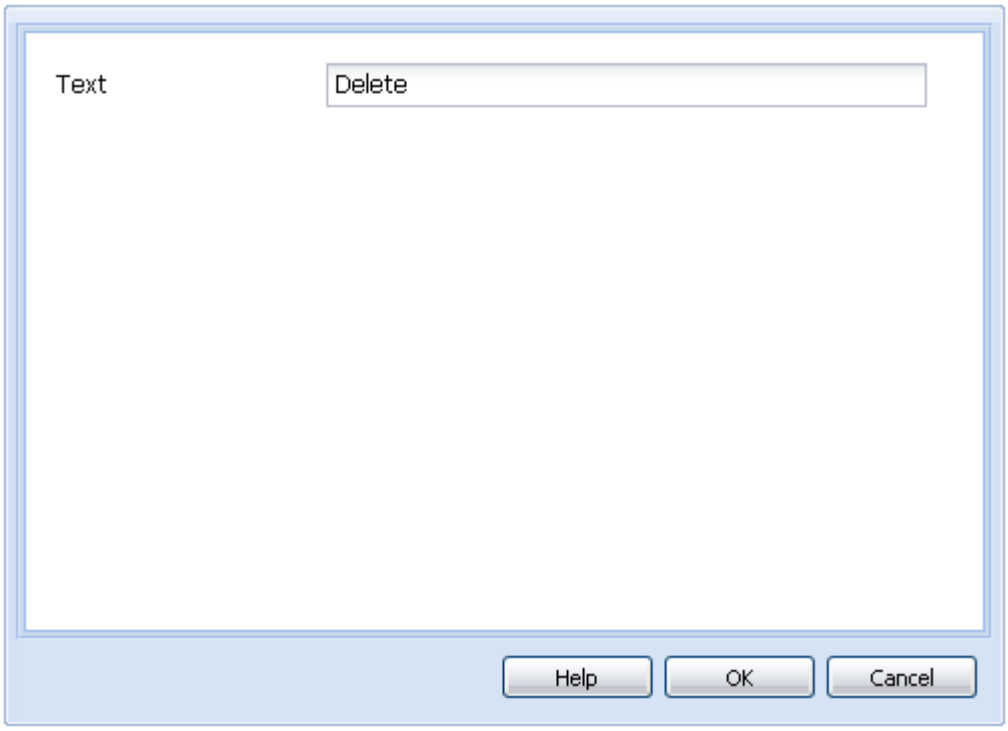
Warning

Care must be taken when editing these components. The settings are often an integral part of the design of the entire website, so they should only be changed by someone with the appropriate experience.

Copyright 1993-2009 Day Management AG

4.3.1 Delete Action

The Delete Action lets users delete selected assets. You can customize the text users see. By default, the word "Delete" displays.



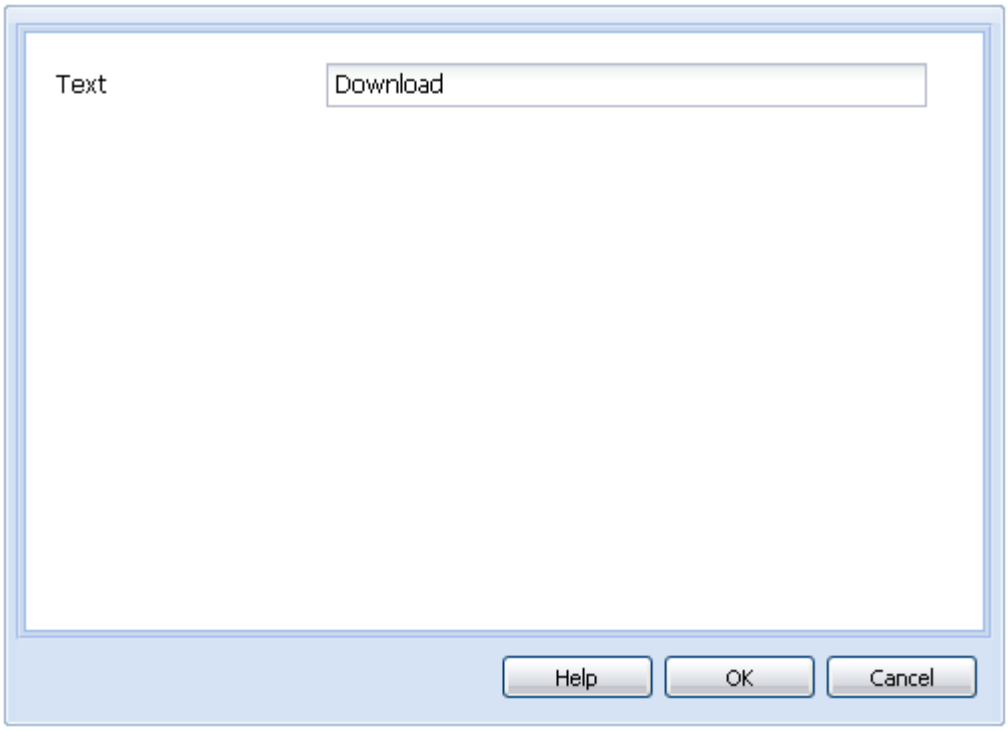
Text
: The text displayed for the Delete action.

The following example shows the Delete Action component in Geometrixx:

4.3.2 Download Action

The Download Action lets users download selected assets. You can customize the text users see. By default, the word "Download" displays.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



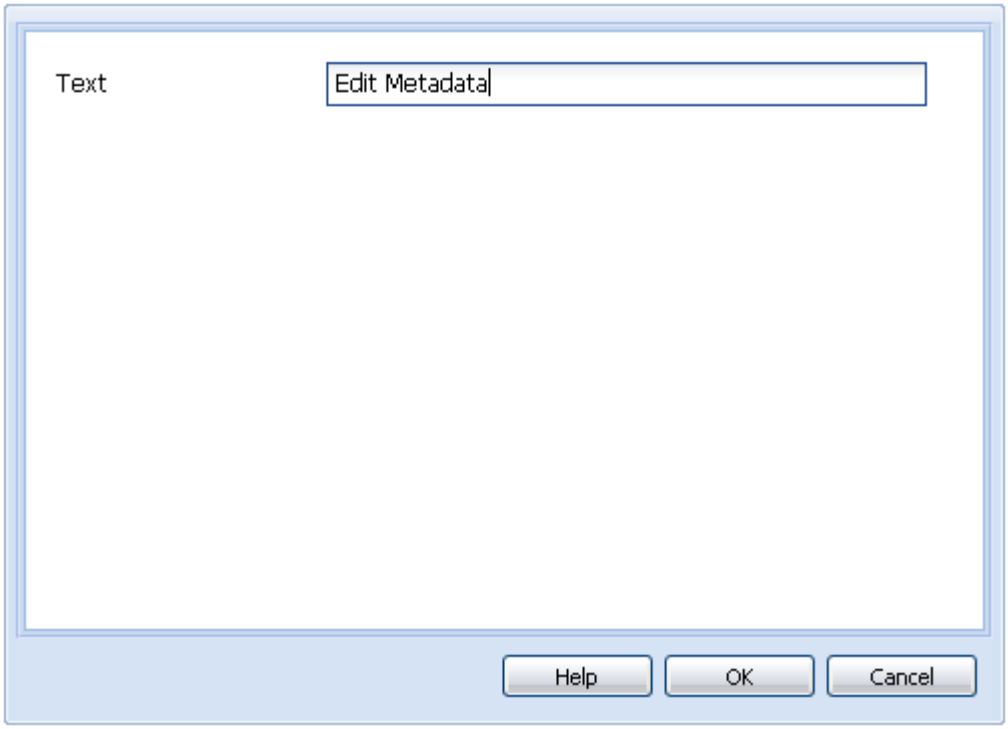
Text
The text displayed for the Download action.

The following example shows the Download Action component in Geometrixx:

4.3.3 Edit Metadata Action

The Edit Metadata Action lets users edit tags and metadata for selected assets. You can customize the text users see. By default, the word "Edit Metadata" displays.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



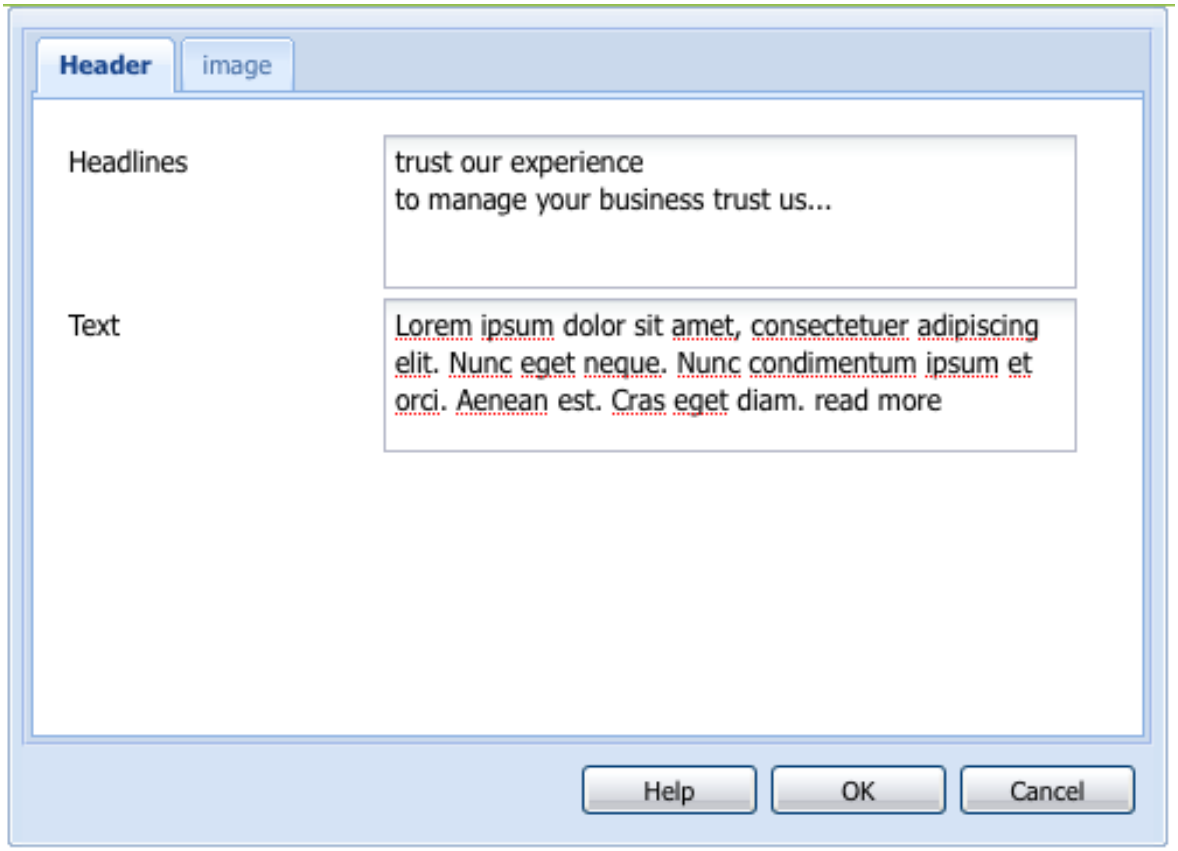
Text
The text displayed for the Edit Metadata action.

The following example shows the Edit Metadata Action component in Geometrixx:

4.3.4 Header

The Header displays a graphical header banner at the top of the page, together with overlaying text. Usually a header is used on a home page.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Headlines
: Lines of text displayed at the top of the header.

  Differing fonts and sizes are used for each new line of text.

Text
: A section of text displayed under the headlines using a much smaller font.

Image
: The image to be shown.

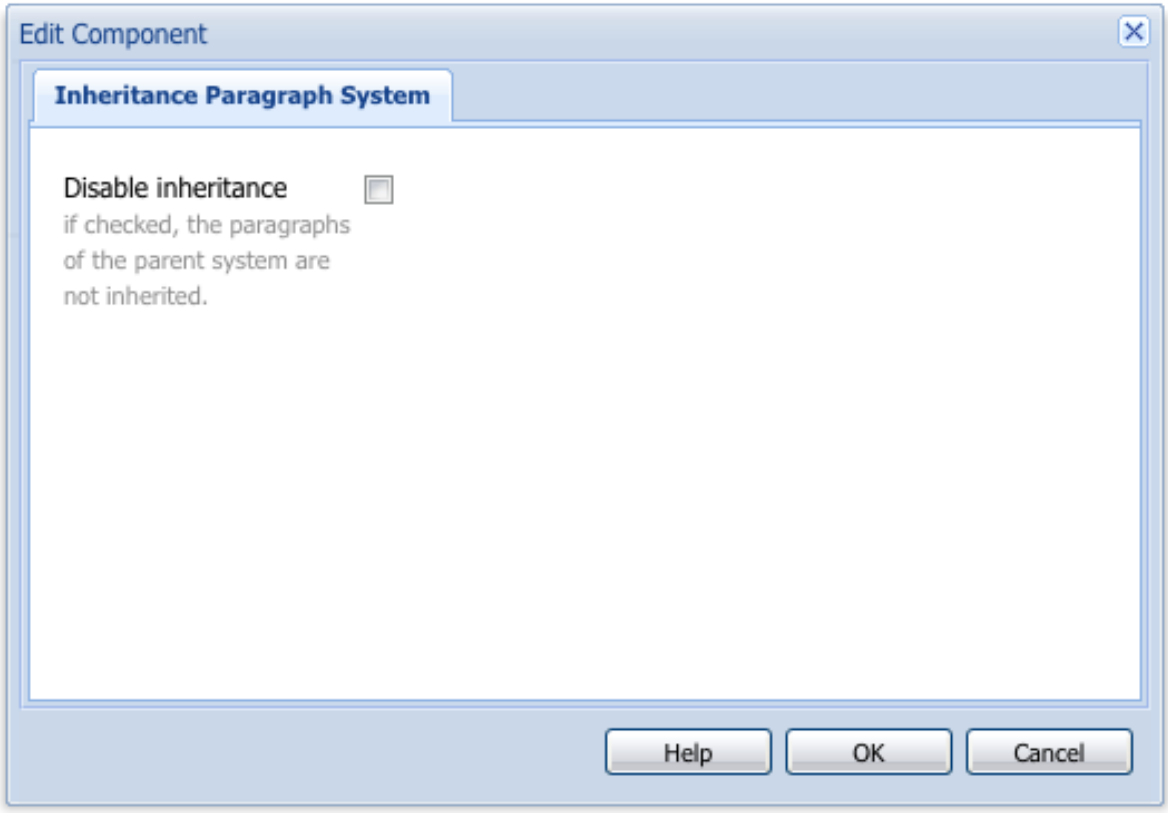
The following example shows the Header component in Geometrixx:

TRUST OUR EXPERIENCE
TO MANAGE YOUR BUSINESS TRUST US.....
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Nunc eget neque. Nunc condimentum ipsum et orci.
Aenean est. Cras eget diam. read more

4.3.5 Inheritance Paragraph System (iparsys)

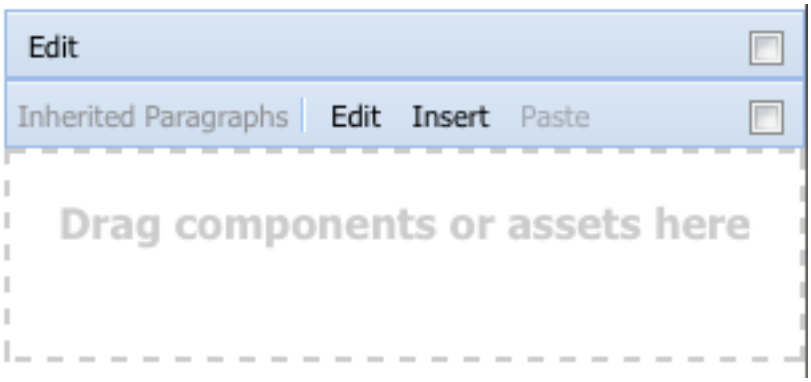
The inherited paragraph system is a paragraph system that also allows you to inherit the created paragraphs from the parent. You add paragraphs to iparsys at for example, `/content/geometrixx/en/products` and as result, all the subpages of `products` that also have iparsys with the same name inherit the created paragraphs from the parent. On each level, you can add more paragraphs, which are then inherited by the children pages. You can also cancel paragraph inheritance at a level at any time.

Copyright 1993-2009 Day Management AG



Disable Inheritance
If selected, child pages do not inherit the paragraphs of this page.

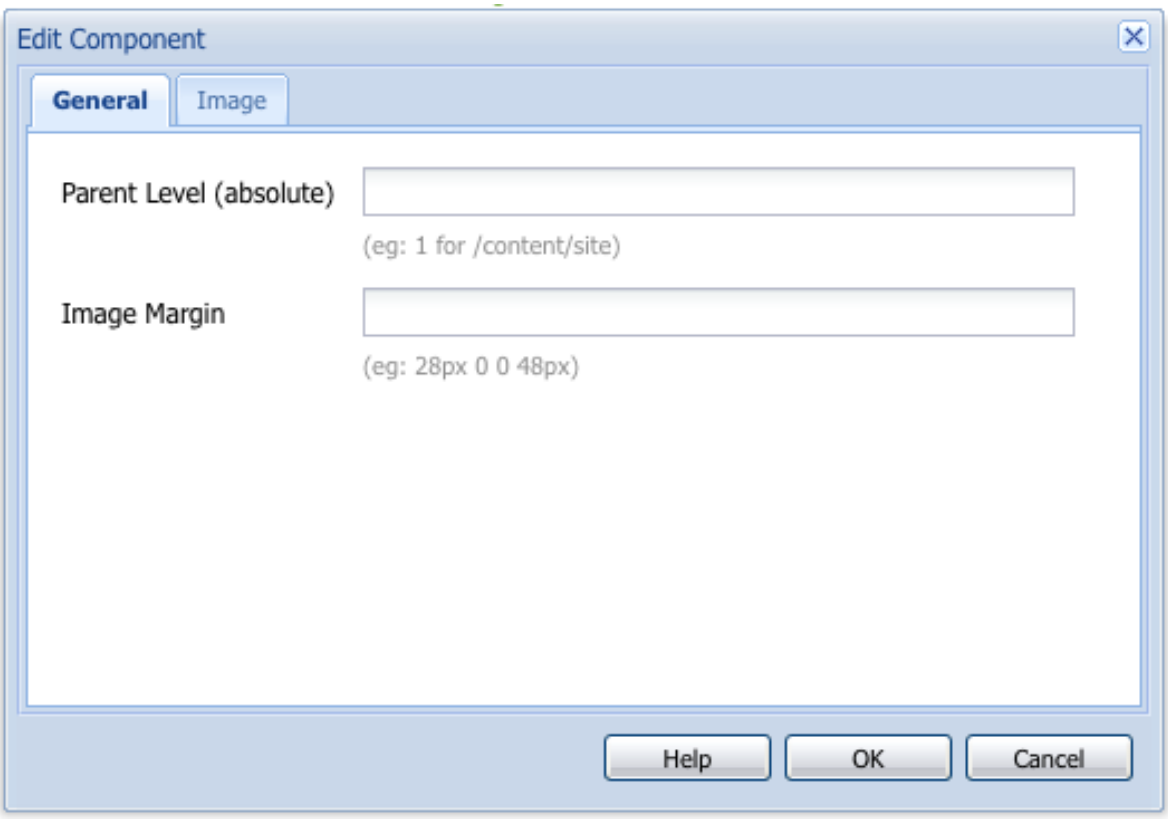
The following example shows the iparsys component in Geometrixx:



4.3.6 Logo

The logo is a clickable image that points to another part of the site.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Parent Level (absolute)
: Determines where the logo image points to; that is, when users click the logo, they go to the level indicated. In Geometrixx, if you enter 1, the logo link points to `/content/geometrixx` and if you enter 2, the logo link points to `/content/geometrixx/en` and so on.

Image Margin
: Sets the margin between the image and the remaining space.

Image
: Drag an image to the logo image, then map, crop or rotate as required.

4.3.7 Paragraph System (parsys)

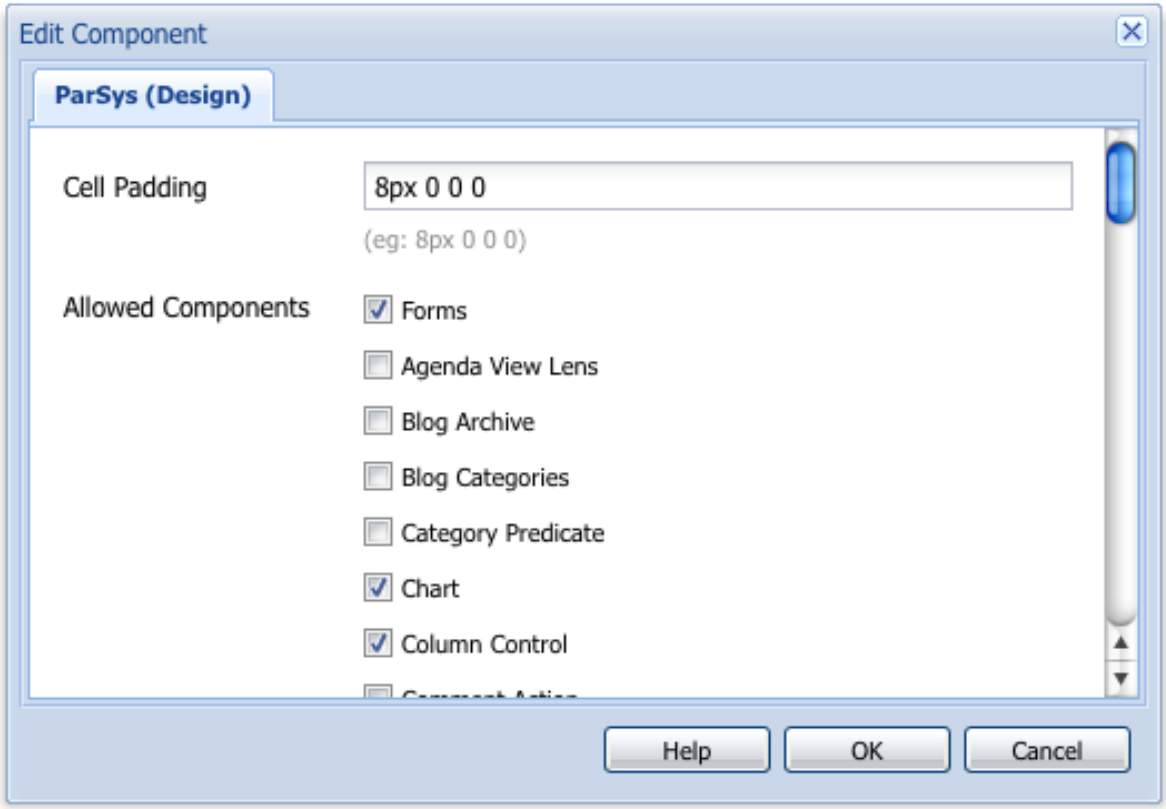
The paragraph system (parsys) is a compound component that allows authors to add components of different types to a page and contains all other paragraph components. Each paragraph type is represented as a component. The paragraph system itself is also a component, which contains the other paragraph components.

You configure which components users see by making them available to the user in Design mode.

For example, the content of a product page may contain the following:

- An image of the product (in the form of an image or textimage paragraph)
- The product description (as a text paragraph)
- A table with technical data (as a table paragraph)
- A form users fill out (as a forms begin, forms element, and forms end paragraph)

Copyright 1993-2009 Day Management AG



List of components available for use...

See individual components.

4.3.8 parbase

Parbase is a key component as it allows components to inherit attributes from other components, similar to subclasses in object oriented languages such as Java, C++, and so on. For example, when you open the `/libs/foundation/components/text` node in the CRX Explorer, you see that it has a property named `sling:resourceSuperType`, which references the parbase component. The parbase here defines tree scripts to render images, titles, and so on, so that all components subclassed from this parbase can use this script.

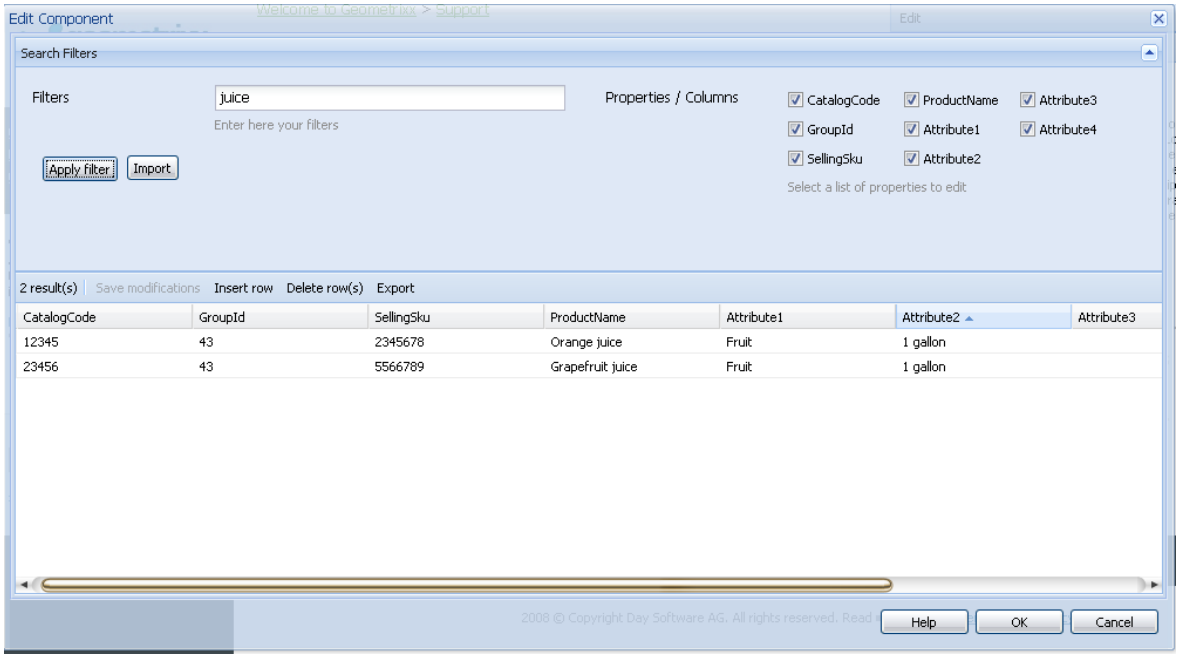
Users do not need access to the parbase.

4.3.9 Product List

The product list component can do the following:

- allow users to enter information in a grid-oriented table
- import information from a .tsv (tab-separated) spreadsheet
- export information into a .tsv spreadsheet

Copyright 1993-2009 Day Management AG



Filters
: Enter the terms that you want CQ WCM to filter for. The list only shows those entries that include that term.

Apply Filter
: Applies any filters to the list.

Import
: Click this button to import an external .tsv file.

Important

Importing data overwrites existing data.

Properties/Columns
: Selected properties or columns appear in the results list. You can edit directly in the cells by double-clicking in them.

Save modifications
: Lets you save any edits you make locally. To make edits, double-click the cell and make changes. Cells that have unsaved changes are indicated with a red triangle in the upper right corner. Be sure to save your changes before clicking **OK** or your changes will be lost.

Insert/Delete Row
: Inserts a row or deletes the current row.

Export
: Exports the list to a tab-separated (.tsv) file that you can edit in a spreadsheet program.

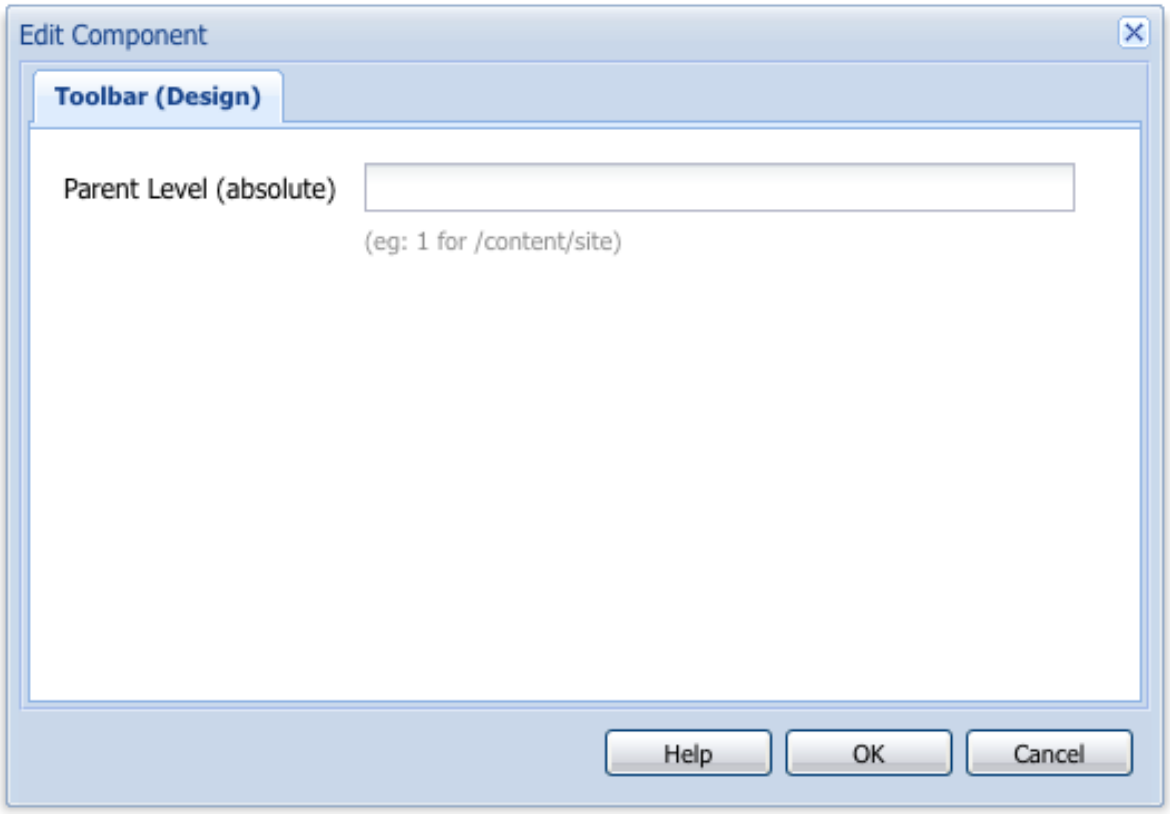
The following example shows a **`Product Listing`** component in Geometrixx:

CatalogCode	GroupId	SellingSku	ProductName	Attribute1	Attribute2
12345	43	2345678	Orange juice	Fruit	1 gallon
23456	43	5566789	Grapefruit juice	Fruit	1 gallon

Copyright 1993-2009 Day Management AG

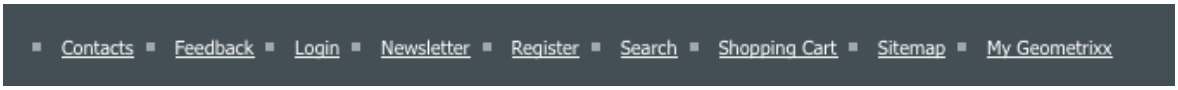
4.3.10 Toolbar

The toolbar appears at the bottom of the page and is a navigational tool.



Parent Level (absolute)
: Determines from what level the toolbar lists links to children pages. Looks for a child node named `/toolbar`.

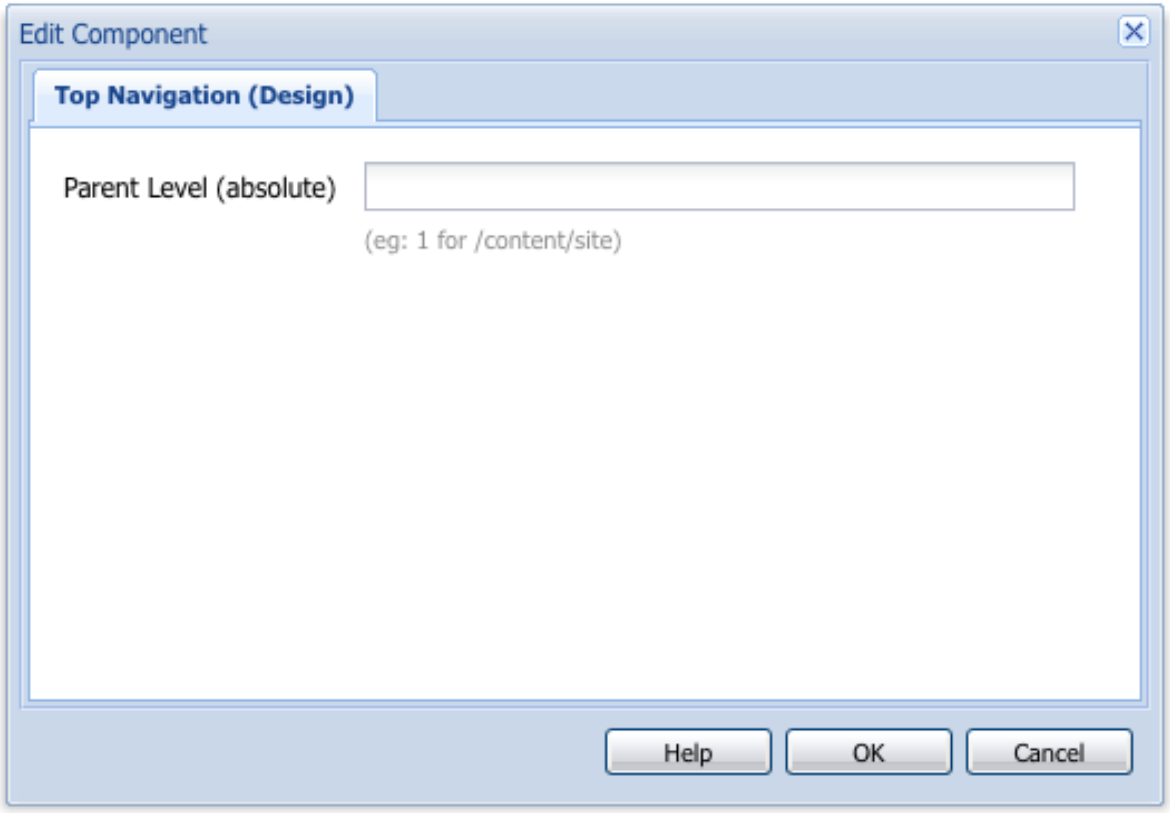
The following example shows the toolbar in Geometrixx:



4.3.11 Topnav (Top navigation bar)

The top navigation bar appears at the top of the page and helps users navigate to the different content sections.

Copyright 1993-2009 Day Management AG



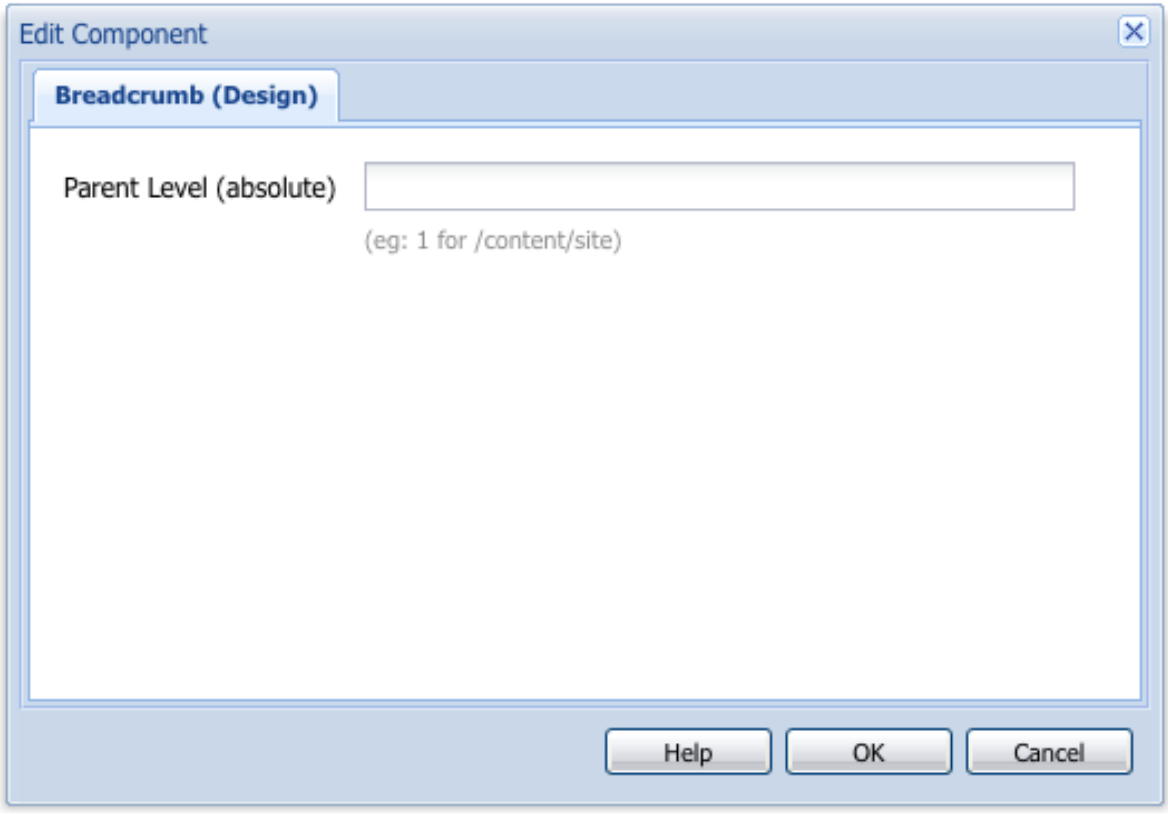
Parent Level (absolute)
: Determines from what level the children get listed in the top navigation bar. In Geometrixx, if you enter 1, topnav renders a link to `/content/geometrixx/en` in the top navigation bar, the only child page of `/content/geometrixx`. If you enter 2, CQ displays all children of `/content/geometrix/en` (this is the default).

The following example shows the top navigation bar in Geometrixx:

4.3.12 Trail (Breadcrumb)

The breadcrumb trail appears at the top of the page and shows users the path they have taken down through the hierarchy. Links allows them to ascend the hierarchy on the same path.

Copyright 1993-2009 Day Management AG



Parent Level (absolute)
: Determines from what level the children get listed in the trail. In Geometrixx, if you enter 1, trail renders a link to `/content/geometrixx/en` in the top navigation bar, the only child page of `/content/geometrixx`. If you enter 2, CQ displays all children of `/content/geometrix/en` (this is the default).

The following example shows a breadcrumb trail in Geometrixx:

Copyright 1993-2009 Day Management AG

5 Default Templates

In CQ WCM, a template specifies a type of page.

It defines the structure of a page; including a thumbnail image, and other properties. For example, you may have a separate templates for product pages, sitemaps, and contact information. Templates are comprised of components.

5.1 Overview of templates

CQ WCM comes with several templates including a contentpage, redirect page, and home page.

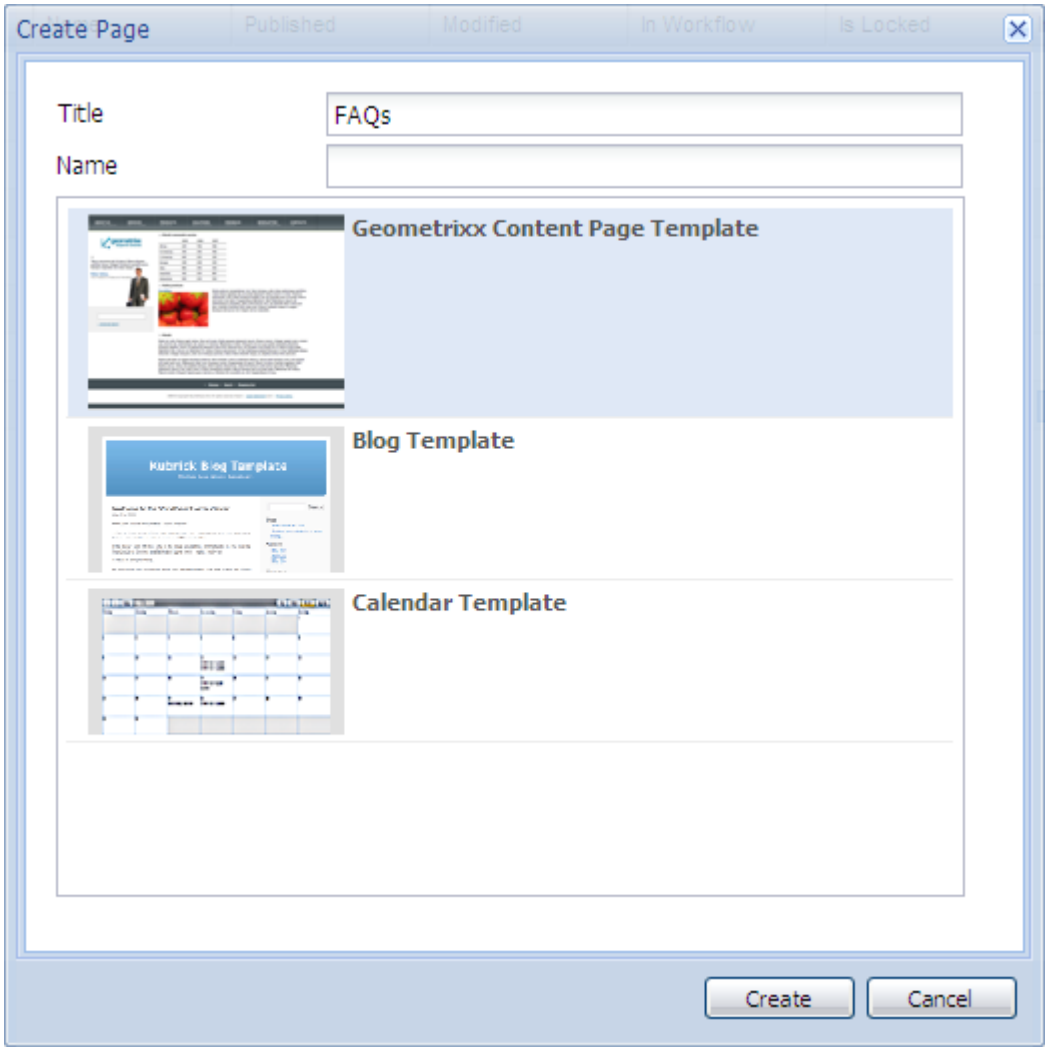
Table 5.1. Templates within CQ5 (/apps/geometrixx/components and /libs/foundation/components)

Title	Component	Location	Purpose
Home Page	homepage	geometrixx	The Geometrixx home page template.
Content Page	contentpage	geometrixx	The Geometrixx content page template.
Redirect	redirect	libs	Redirect. Component and Template.

5.2 Content Page

The content page component creates a new page for content according to a template selected by the author.

Copyright 1993-2009 Day Management AG



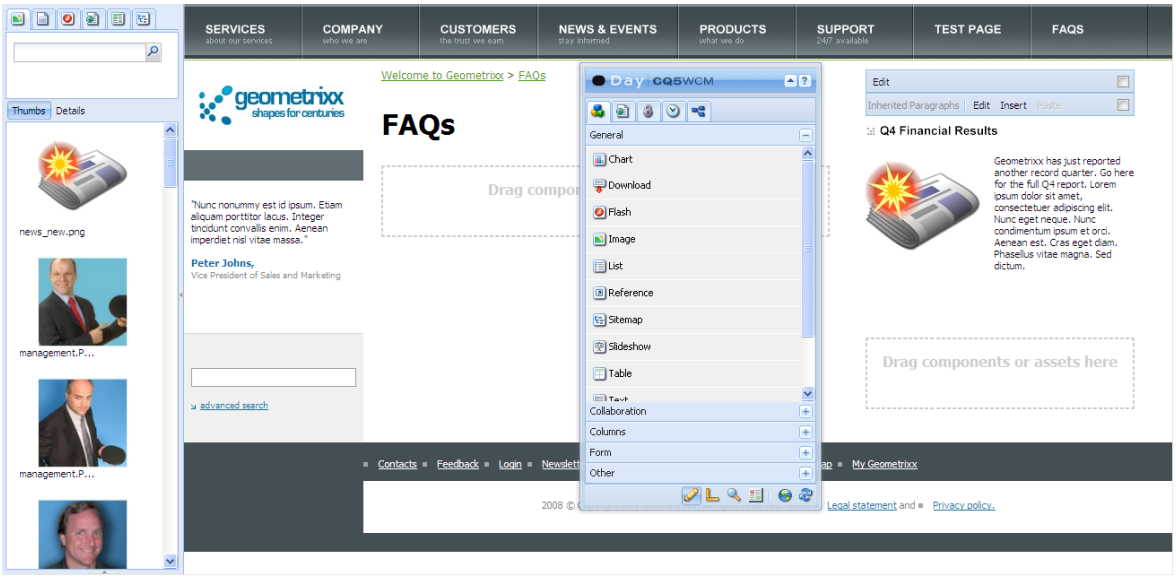
Title
: The title displayed on the resulting web-page.

Label
: The label used when naming the page.

Template
: A list of templates available for use when generating the new page.

The following example illustrates the contentpage component:

Copyright 1993-2009 Day Management AG



5.3 Redirect

Use the Redirect component when you want to redirect users to another page. Redirect is useful for an obsolete page or for structuring the site..

Copyright 1993-2009 Day Management AG

6 Digital Asset Management

CQ DAM (Digital Asset Management) enables your enterprise to share and distribute digital assets. Users across an organization can store, manage, and access digital assets through a Web interface. With the CQ5 platform CQ DAM is also fully integrated with CQ WCM allowing you to seamlessly access, and manage, the assets from within CQ WCM.

Assets can:

- be single files such as digital documents, images, video or audio files.
- form a collection, according to either location, common properties or selection.
- have sub-assets; for example, layers in a Photoshop file, or slides in a Powerpoint file.
- have multiple renditions.

  A rendition is the binary representation of an asset. Each asset has a primary representation - that of the uploaded file. Alternative representations can be created (by customized workflow steps) when an asset is uploaded. These renditions might be of a different size, with a different resolution, with added watermark or some other characteristics.

- have metadata; for example, author, expiry date, DRM Information (Digital Rights Management), amongst others.

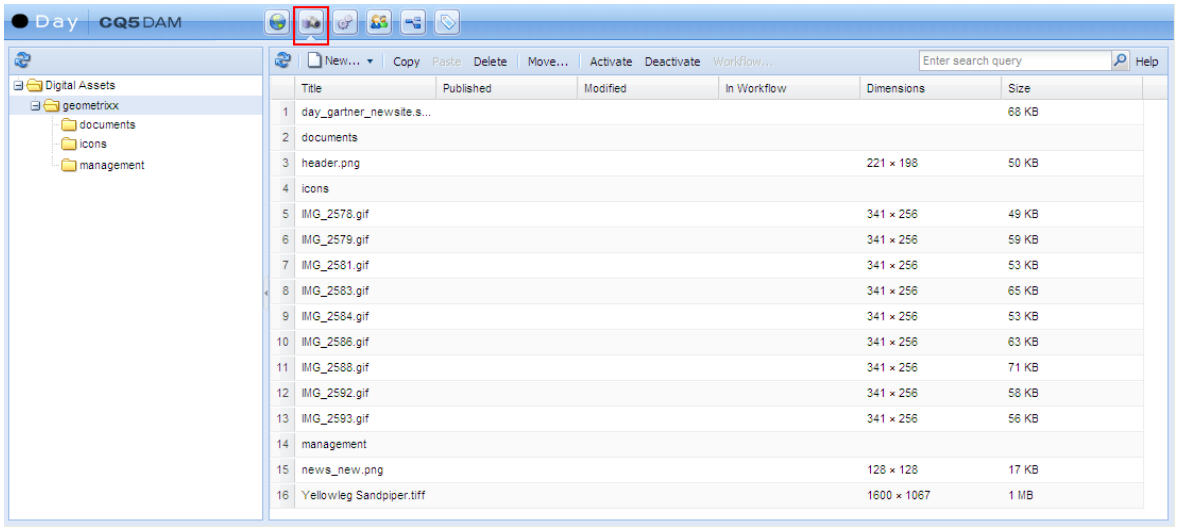
  Various common metadata schemata are supported out of the box:

  - Dublin Core; including author, description, date, subject, amongst others.
  - IPTC; including event, model, location, amongst others.
  - WCM; including page properties, on- and offtimes, amongst others.

- be tagged (see also Chapter 9,).

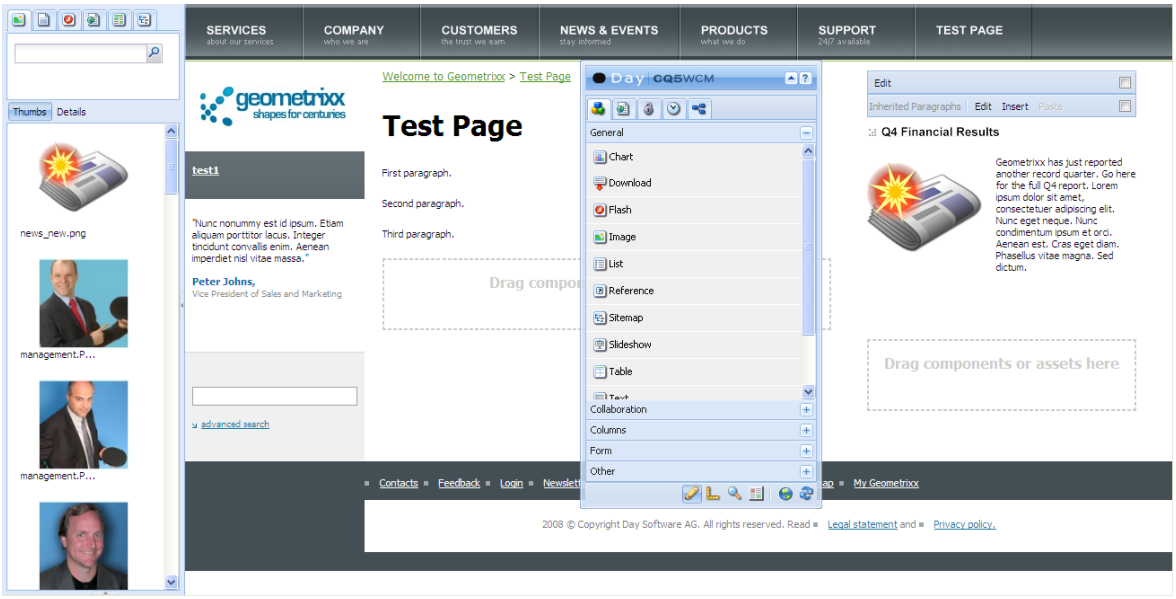
6.1 CQ DAM fully integrated in CQ WCM

CQ DAM is now fully integrated with CQ WCM and functionality is available using the DAM tab:


Day CQ5 DAM
New... Copy Paste Delete Move... Activate Deactivate Workflow...
Enter search query
Help
Digital Assets
geometrixx
documents
icons
management
Title Published Modified In Workflow Dimensions Size
1 day_gartner_newsite.s... 68 KB
2 documents
3 header.png 221 × 198 50 KB
4 icons
5 IMG_2578.gif 341 × 256 49 KB
6 IMG_2579.gif 341 × 256 59 KB
7 IMG_2581.gif 341 × 256 53 KB
8 IMG_2583.gif 341 × 256 65 KB
9 IMG_2584.gif 341 × 256 53 KB
10 IMG_2586.gif 341 × 256 63 KB
11 IMG_2588.gif 341 × 256 71 KB
12 IMG_2592.gif 341 × 256 58 KB
13 IMG_2593.gif 341 × 256 56 KB
14 management
15 news_new.png 128 × 128 17 KB
16 Yellowleg Sandpiper.tiff 1600 × 1067 1 MB

Assets managed within CQ DAM can then be accessed via the content finder of WCM:

Copyright 1993-2009 Day Management AG



Note

The basic GUI handling is the same as the rest of WCM - see Chapter 3, for full details.

Many of the basic actions you undertake on assets (such as upload, delete, update, save sub-assets) trigger preconfigured workflows. These are designed to perform tasks such as:

- save the asset in, or delete the asset from, the repository
- extract, and save, metadata for the asset; the individual metadata items are saved as XMP
- generate renditions and thumbnails for the asset; including automatic resizing and cropping where necessary
- transcode the asset where necessary.

  For example, video for mobile and web usage is transcoded with 24 frames per second, download video with 30 frames per second. Audio for mobile and web usage is transcoded with 128 kbps, audio for download with 192 kbps.

  A selection of encoding standards are supported:

  - XMP: used by CQ DAM to store the extracted metadata within the repository.
  - ID3: for audio and video files.
  - EXIF: for image files.
  - Legacy: from Microsoft Word, Powerpoint, Excel and so on.

See the section called “Applying Workflows to Digital Assets”.

Caution

Uploading and/or editing a large volume of assets (particularly images) can impact the performance of your CQ instance. See the section called “Performance when loading and editing Digital Assets”.

6.2 Managing the individual assets

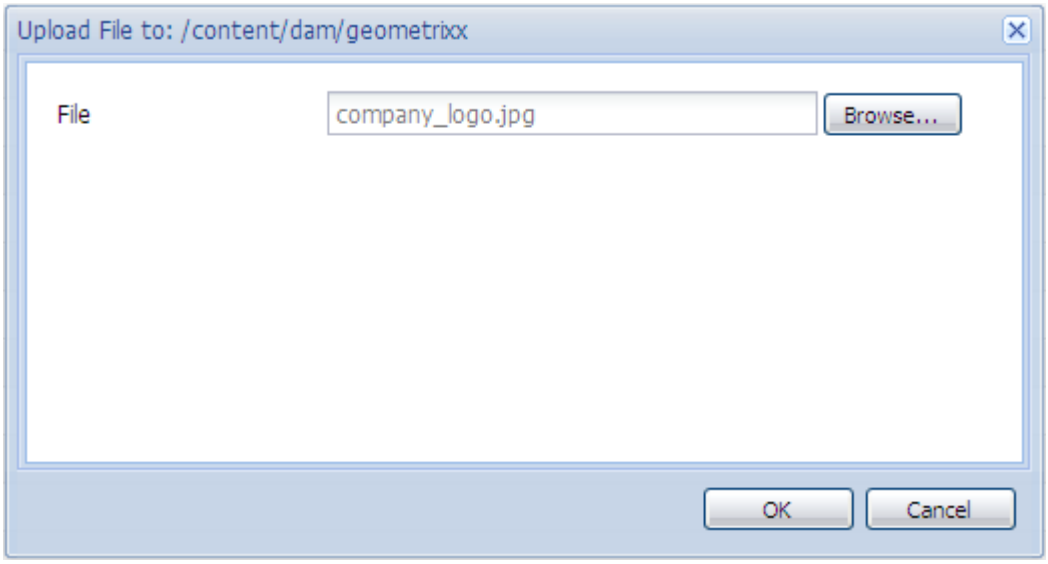
The menu in the DAM tab enables you to take action on the individual assets:

Copyright 1993-2009 Day Management AG

6.2.1 Upload File

This option allows you to upload a new asset file.

1. Navigate to the required location.
2. Click **`New...`** to open the dialog. Use **`Browse...`** to locate and select the file you want to upload:



3. Click **`Close`** to close the dialog.

6.2.2 Create Folder

You can create a folder to hold a collection of assets. This is purely organizational:

1. Navigate to the required location.
2. Click the arrow by **`New...`** then select **`New Folder...`**.

   You can now specify a name:

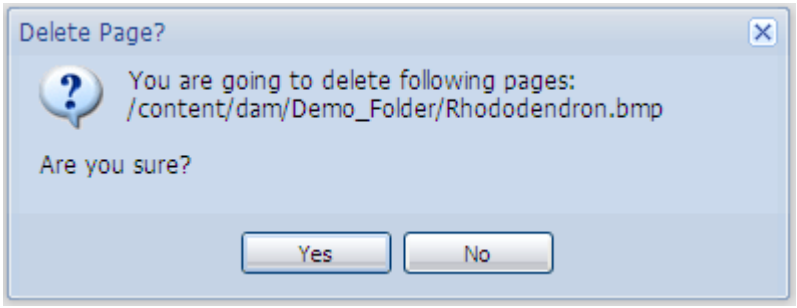
3. **`Create`** will generate the folder.

6.2.3 Delete

To delete an existing asset:

Copyright 1993-2009 Day Management AG

1. Select an asset.
2. Select **Delete**. You will be asked to confirm the action:

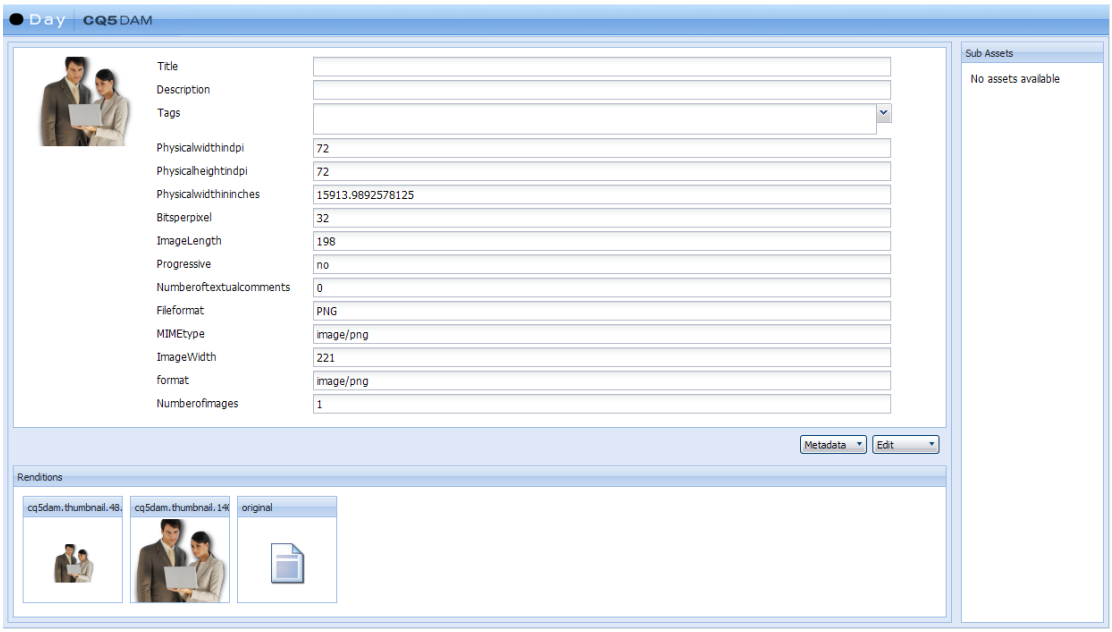


3. Select **Yes** to actually delete the asset, or **No** to abort the action.

6.2.4 Edit the metadata for an Asset

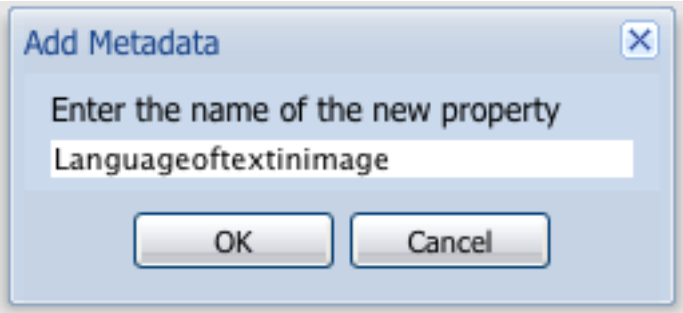
Metadata is additional information about the asset that can be searched.

1. You can open the metadata of an asset for editing by either selecting the asset then the drop-down menu option **Open**, or by **double-clicking** the asset. A dialog such as the following opens:



2. Enter your required text for the **Title** and **Description**.
3. If required you can:
   - assign **Tags** if required.
   - see the metadata that has been automatically extracted.
   - add a new metadata property (click **Metadata** then select **Add Metadata...**):

Copyright 1993-2009 Day Management AG



- view the various renditions, if the asset is an image; click the appropriate thumbnail to open the asset in the browser.
- see any sub assets, if available.
- use **Edit** to **Edit Image...**, **Reset Original**, **Upload Thumbnail...** or **Overwrite Binary...**.
- save your changes to the metadata (click **Metadata** then select **Save Metadata...**)

6.2.5 Copy

Select an asset, then select **Copy** to copy it to the internal clipboard.

6.2.6 Paste

Select the location, then **Paste** from the menu to paste the asset (which has been previously copied).

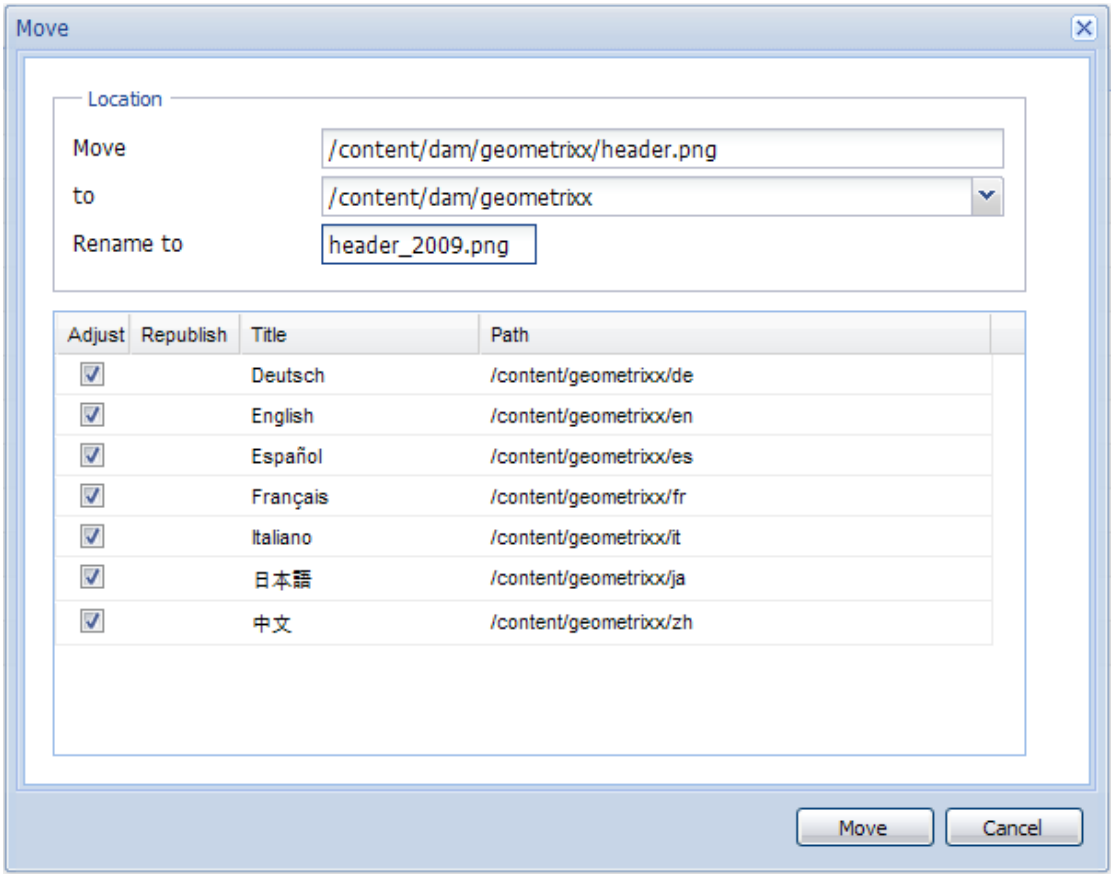
If the original (or another file with the same name) exists in this target folder, then "1" is appended to the file suffix, for example `IMG_0001.gif` will become `IMG_0001.gif1`.

6.2.7 Move (or Rename)

The Move option can be used to either move and/or rename an asset:

1. Select an asset.
2. Select **Move** from the menu. A dialog will be opened:

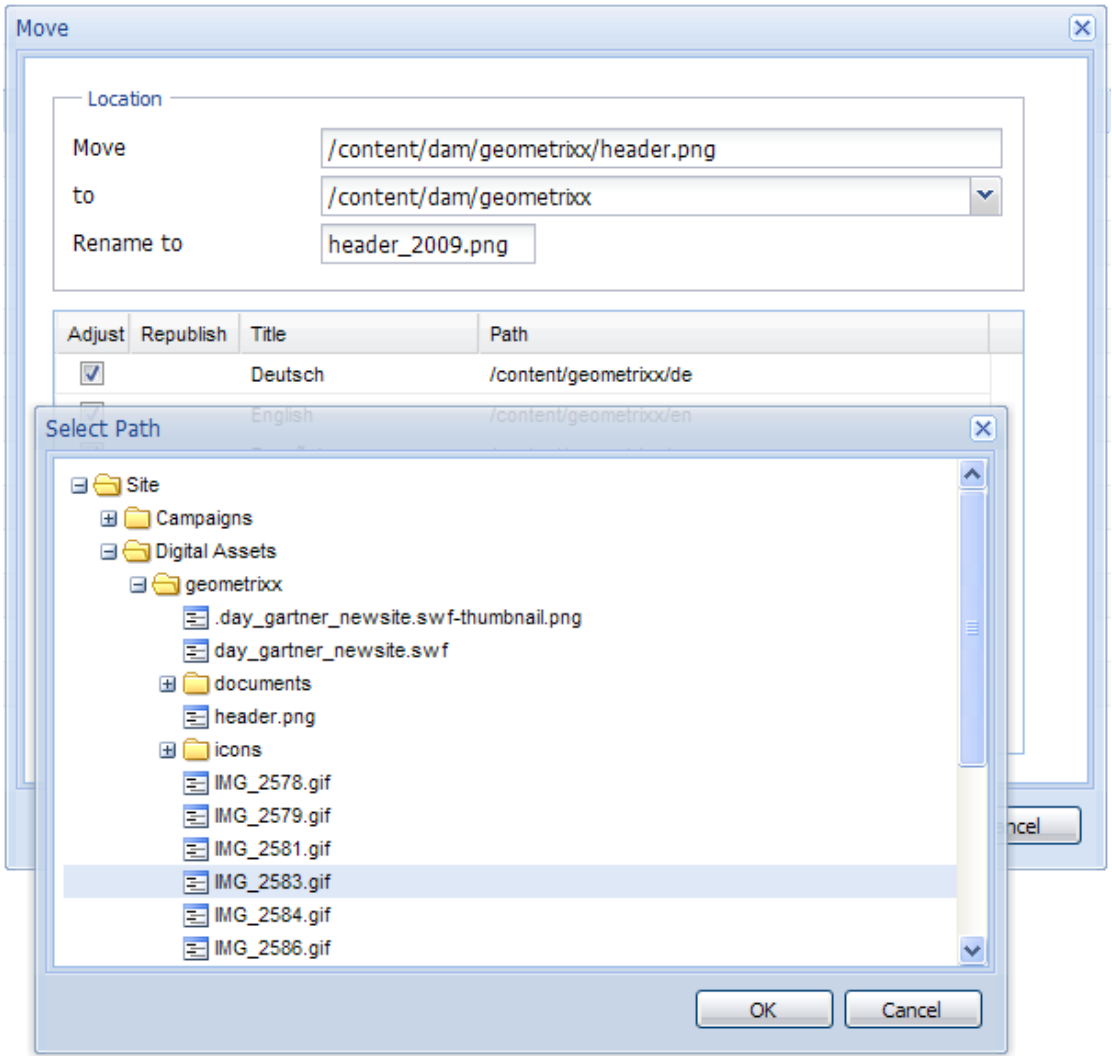
Copyright 1993-2009 Day Management AG



The list shows references to the asset.

3. Specify the target location - **`to`**. For easy selection a site map is opened with the drop down option:

Copyright 1993-2009 Day Management AG



4. You can use **`Rename to`** to assign a new name to the asset.
5. Select whether to **`Adjust`** references to the original asset to point to the new name and/or location.
6. Click **`Move`** for the asset to be moved and/or renamed.

6.2.8 Activate

Here you can **`Activate`** a single asset.

6.2.9 Deactivate

Here you can **`Deactivate`** a single asset.

6.3 Applying Workflows to Digital Assets

Workflows can be applied to assets in exactly the same manner as for pages. See Chapter 8, for further details.

Various workflows are supplied with CQ WCM for manipulating assets:

- Dam asset syncer and metadata extractor
- Dam delete asset

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

- Dam sub asset processor
- Dam update asset

6.4 How to upload a Digital Asset using WebDAV

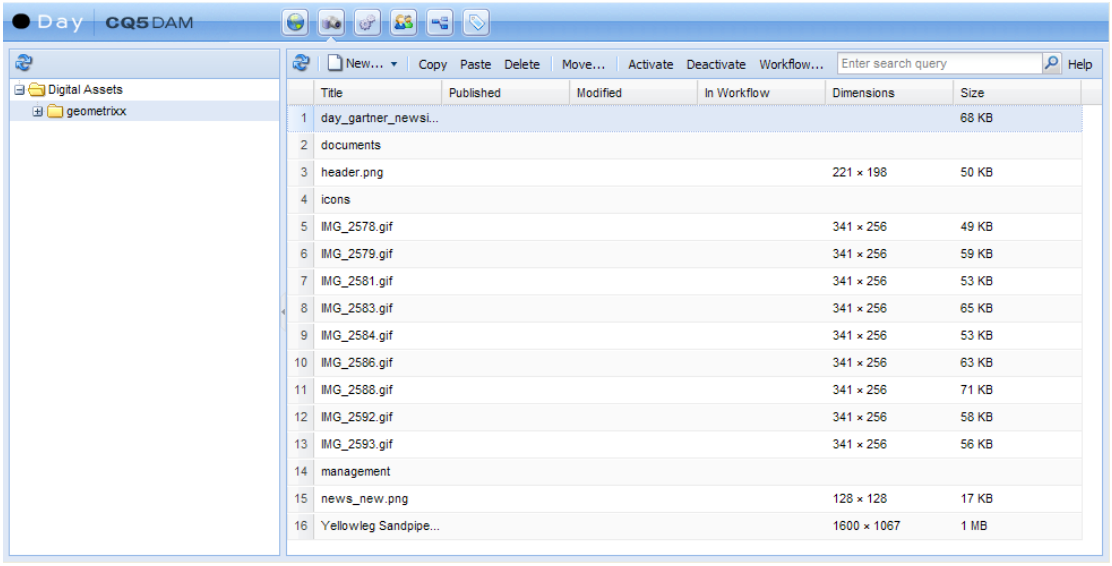
Digital Assets can be manipulated using WebDAV. This is often of particular use when uploading a large number of assets.

Note

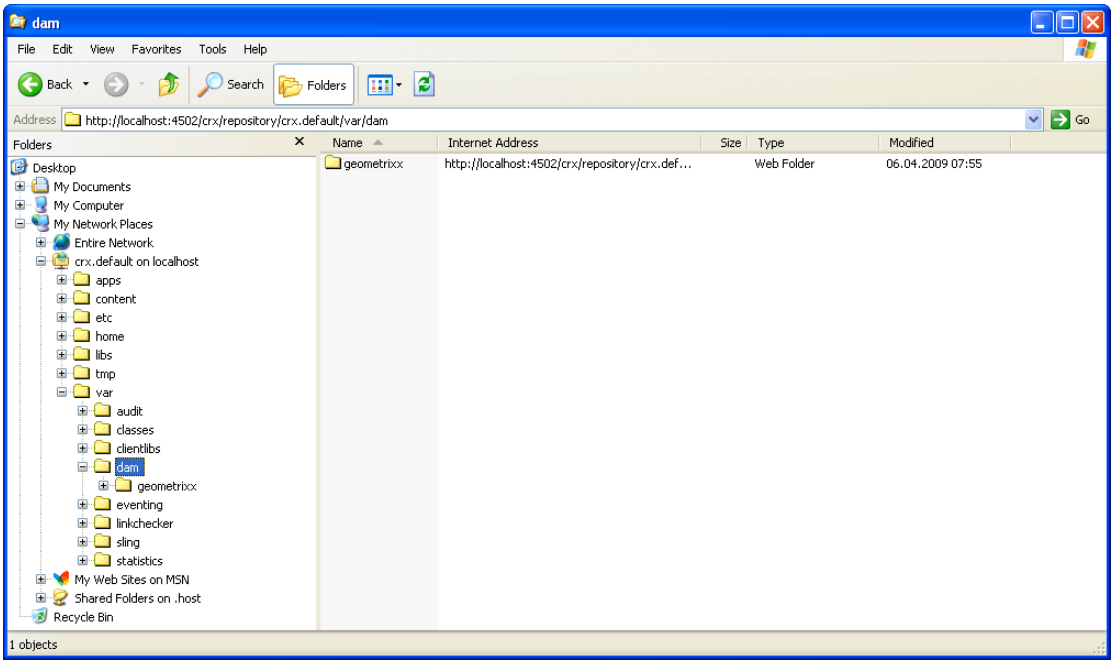
Updating or deleting assets can be done using the same basic method.

To upload a digital asset using WebDAV use the following steps:

1. Connect to the DAM tab in CQ WCM. Here you can see what is already available:


Day CQ5 DAM
New... Copy Paste Delete Move... Activate Deactivate Workflow... Enter search query Help
Digital Assets
geometrixx
Title Published Modified In Workflow Dimensions Size
1 day_gartner_newsi... 68 KB
2 documents
3 header.png 221 × 198 50 KB
4 icons
5 IMG_2578.gif 341 × 256 49 KB
6 IMG_2579.gif 341 × 256 59 KB
7 IMG_2581.gif 341 × 256 53 KB
8 IMG_2583.gif 341 × 256 65 KB
9 IMG_2584.gif 341 × 256 53 KB
10 IMG_2586.gif 341 × 256 63 KB
11 IMG_2588.gif 341 × 256 71 KB
12 IMG_2592.gif 341 × 256 58 KB
13 IMG_2593.gif 341 × 256 56 KB
14 management
15 news_new.png 128 × 128 17 KB
16 Yellowleg Sandpipe... 1600 × 1067 1 MB

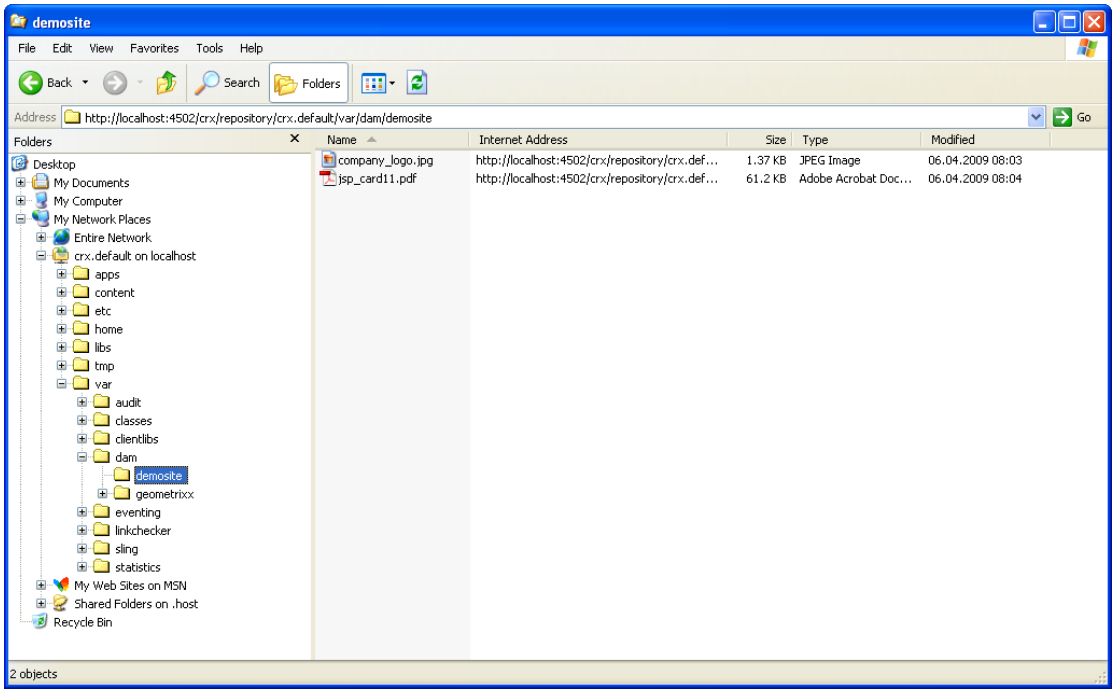
2. Connect to the repository using WebDAV (or any equivalent) method. Navigate to the `/var/dam` folder. Here you can see the same contents as above:



3. Create any new folders required, and copy your assets into the required location.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

In the example below, a new folder `demosite` is created, and two assets placed there:

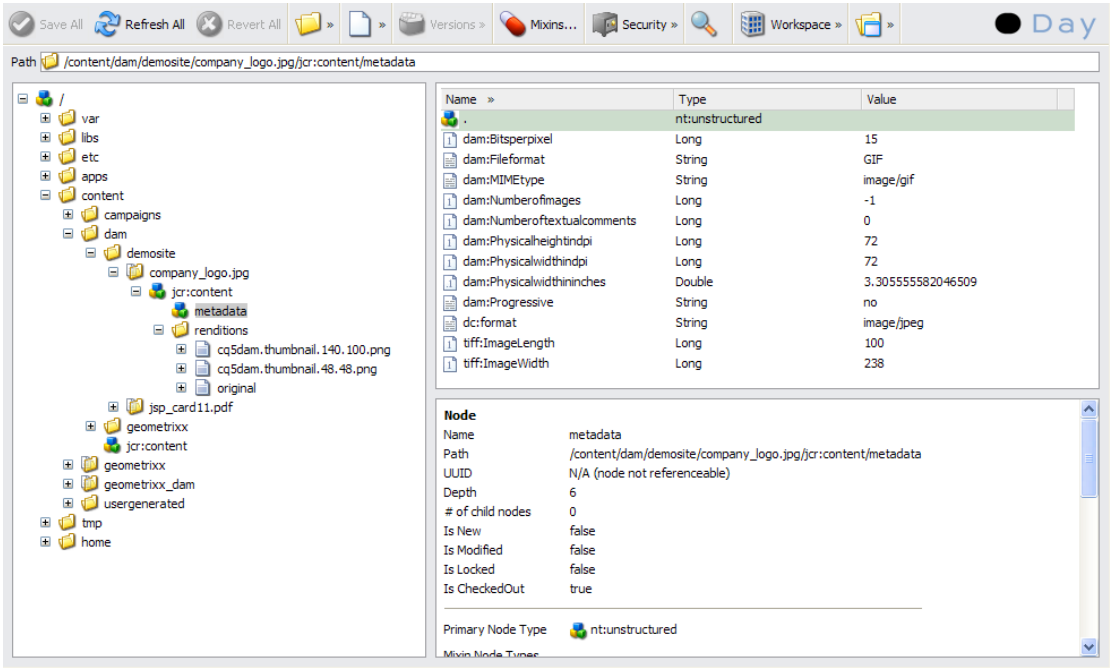


All “file creations” in the `/var/dam` structure are automatically detected by the workflow “Dam asset syncer and metadata extractor”. For each asset the workflow takes the appropriate actions:

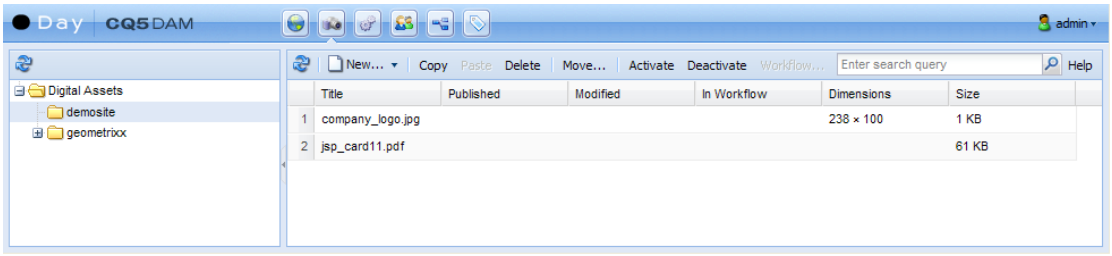
- creates a corresponding dam:Asset node in the /content/dam folder
- copies the original asset file (for example, `About Downloads.pdf`) to the new location (for example, `/content/dam/demosite/About Downloads.pdf/jcr:content/renditions/original`)
- extracts any available metadata
- creates thumbnails if possible

4. If you look at the `/content/dam` folder in the CRX explorer you can see the new structure, including any metadata and thumbnails that have been generated:

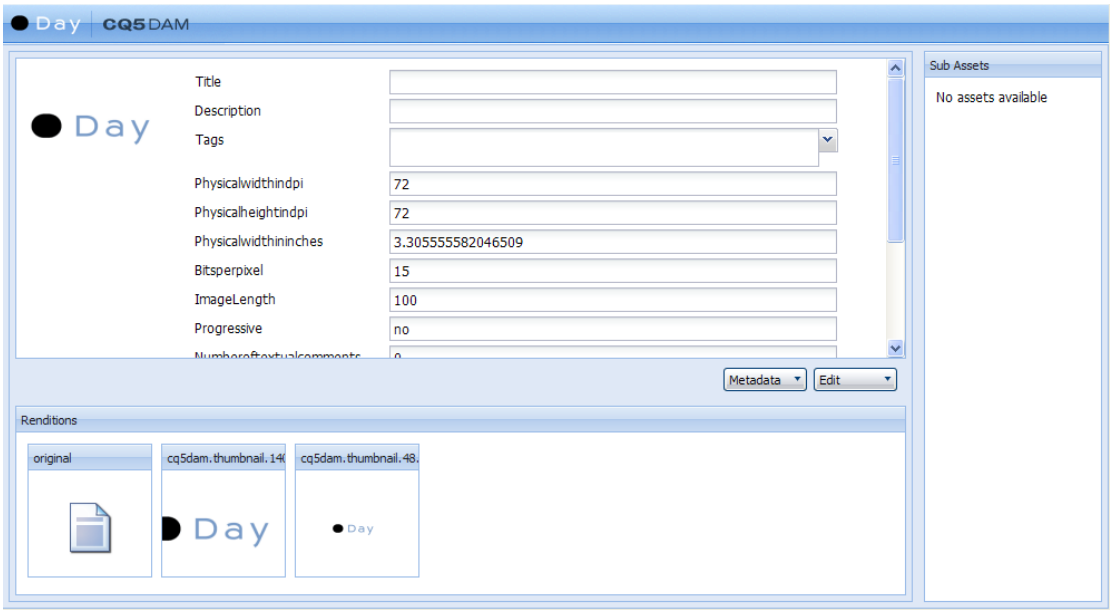
Copyright 1993-2009 Day Management AG



5. When you return to the DAM tab in CQ, you can now see the assets:



6. Various key pieces of metadata have already been automatically extracted, other can be edited from within the DAM tab:

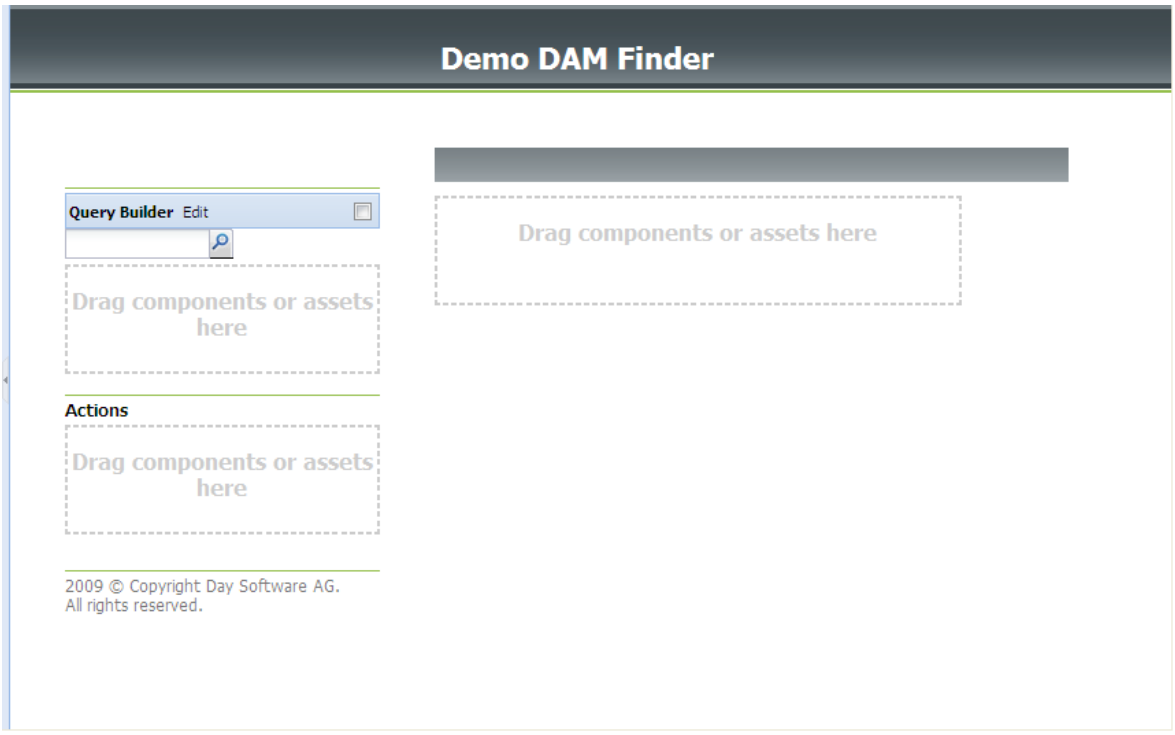


6.5 Finding Assets with the Asset Share

Copyright 1993-2009 Day Management AG

To aid you managing digital assets “finder” functionality is included. This allows you to find a set of assets according to predicates which you define, then perform one of a range of actions on the results.

A basic template is included out-of-the-box in CQ WCM, but it is expected that your installation will have a customized version. The basic page created using the **`Geometrixx DAM Page Template`** comprises of various sections:



and the Sidekick also contains customized elements, including:

- General components for formatting content
- Actions
- Lenses
- Predicates

These elements can be placed on the finder page to construct your query and action:

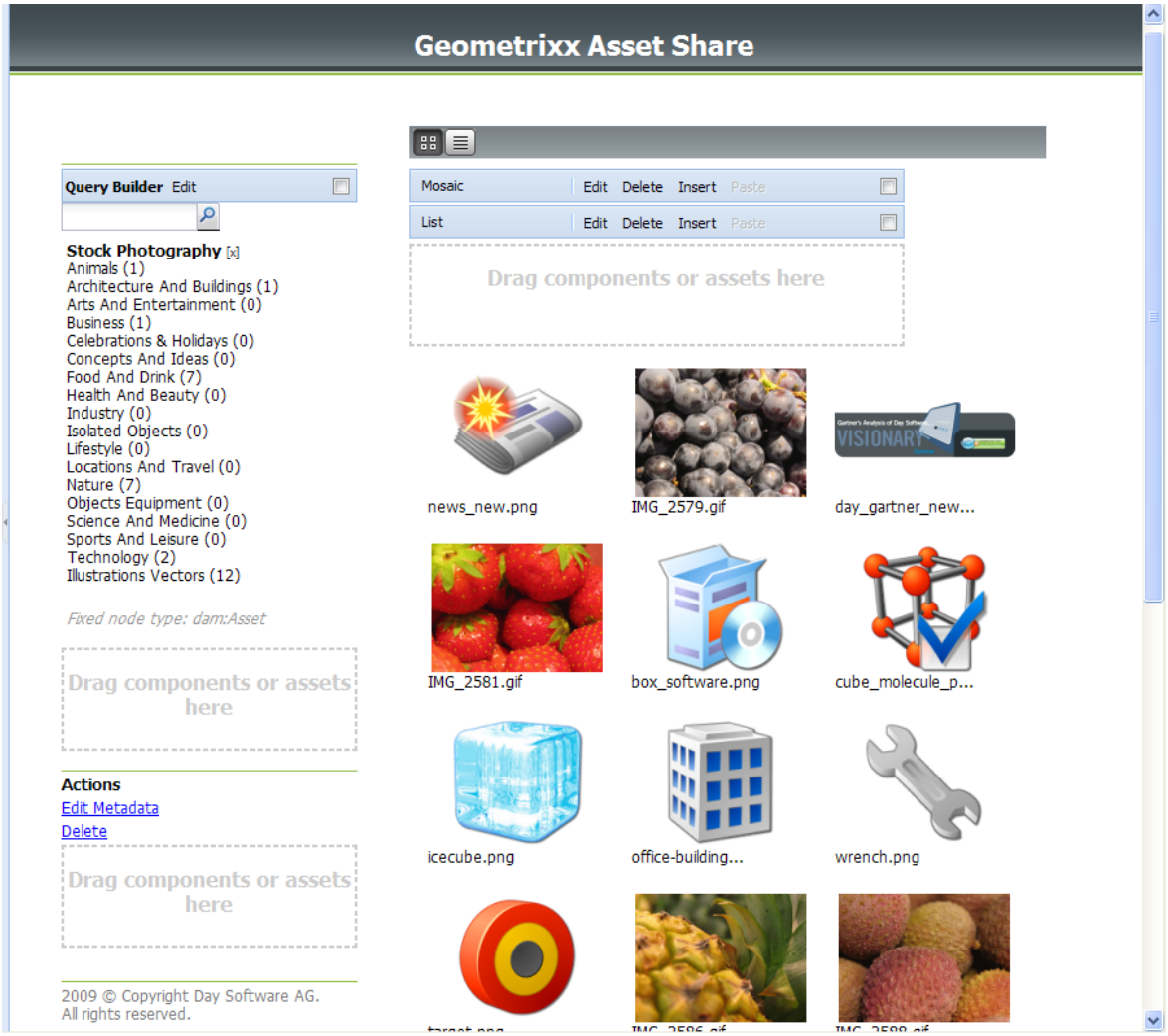
Query Builder
: Here you can:
  - enter a search term
  - create content for the finder page
  - define the predicates used in the selection of assets

Lenses
: Using the various lenses you can specify how the results are to be displayed:
  - List
  - Mosaic

Actions
: A selection of predefined actions are available. Dragging one of these to the finder page will create a button used to execute that action.

Copyright 1993-2009 Day Management AG

The page **`Geometrixx Asset Share`** has been based on this template:



Copyright 1993-2009 Day Management AG

7 User Administration and Security

This chapter describes how to configure and maintain user authorization and also describes the theory behind how authentication and authorization work in CQ WCM.

7.1 A quick overview of Authentication and Authorization

7.1.1 Authentication

Authentication is the process of identifying, and verifying, a user.

The process of authentication and login can be broken down as follows:

1. Authentication information is extracted from the request. In CQ this is done by an *authentication handler*.
2. The authentication information is then checked to determine whether it is sufficient and/or correct. In CQ this is performed by the *login modules*.
3. The appropriate response is initiated.

For CQ, initial authentication uses a standard HTML-login form in conjunction with the *Authorization Header Authentication Handler*. The HTML-form must have fields for the user name and password (the same field names must then be used by the Authorization Header Authentication Handler).

You can also use a similar form for controlled access to various areas of your website.

7.1.1.1 LDAP, Single Sign On and Portals

The various authentication methods can be realized by using different login modules.

For example, CQ can interact with a LDAP server that stores user information centrally, eliminating the need for duplication. This central server is then used to verify login information which enables you to realize Single Sign On, both with other in-house applications and external Portals. See CRX - LDAP Authentication for further information.

7.1.2 Authorization

Authorization determines whether a user is allowed to take action on specific areas within the system. For example, a user can be authorized to read or update a specific page.

Authorization is managed using a series of entities:

User
: A user accesses a system using their user account. A user models either a human user or an external system connected to the system. The user account holds the details needed for accessing CQ; a key purpose of an account is to provide the information for the authentication and login processes - allowing a user to log in.

Groups
: A group is a collection of users and/or other groups. A change in the permissions/privileges assigned to a group is automatically applied to all users in that group. A user does not have to belong to any group, but often belongs to several.

Action
: Actions are performed on a resource. For example, a user can read, edit or delete a page, amongst other actions.

Permissions
: A permission allows a user to perform an action on a given resource within the repository. Permissions are stored, and can be seen, at resource level within the repository.

Copyright 1993-2009 Day Management AG

Privileges
: Privileges allow access to functionality available within the application; for example, replication of a specific path, or the ability to update the page hierarchy (including creating new pages).

Resources
: Resources define the functionality to be accessed.

7.2 Authorization for CQ WCM - The Concepts

This section deals with the various entities and related concepts in more detail to help you configure an easy to maintain user management concept.

7.2.1 Users

Users will log in to CQ with their account. Each user account is unique and holds the basic account details, together with the privileges assigned.

Users are often members of Groups, which simplify the allocation of these permissions and/or privileges.

7.2.2 Groups

Groups are collections of users and/or other groups; these are all called **`Members`** of a group.

Their primary purpose is to simplify the maintenance process by reducing the number of entities to be updated, as a change made to a group is applied to all members of the group. Groups often reflect:

- a role within the application; such as someone who is allowed to “surf” the content, or someone who is allowed to “contribute” content.
- your own organization; you may want to extend the roles to differentiate between contributors from different departments when they are restricted to different branches in the content tree.

Therefore groups tend to remain stable, whereas users come and go more frequently.

With planning and a clean structure, the use of groups can reflect your structure, giving you a clear overview and an efficient mechanism for updates.

7.2.3 Default Users and Groups

CQ WCM installs a number of users and groups. These can be seen when you first access the Security Console after installation.

The following tables list each item with a short description and Day's recommendation about any changes necessary. If you do not delete the accounts listed here, **please change the default password**.

Table 7.1. Default Users and Groups

User ID	Type	Description	Recommendation
`admin` **Default password:** `admin`	User	System administration account and member of the administrator group, with full access rights. This account is used for the connection between CQ WCM and CRX.	**Day strongly recommends that the password for this user account be changed from the default.** Preferably upon installation, though it can be done afterwards. Other attributes cannot be configured as this account is integral to CQ5.

Copyright 1993-2009 Day Management AG

User ID	Type	Description	Recommendation
		As such its configuration cannot be edited - with the exception of the password.	**Note:** This account is not to be confused with the admin account of the Communiqué Servlet Engine.
`anonymous` **Default password:** *none*	User	Holds the default rights for unauthenticated access to an instance. Per default this holds the minimum access rights. For a publish instance, anonymous is a member of the **surfers** group, whereas for an author instance it is a member of the **uploaders** group.	**Do not delete this account.** Modifying this account has additional security implications. If you have to edit this account, make a backup copy first.
`author` **Default password:** `author`	User	A author account allowed to write to `/content`. Encompasses contributor and surfer privileges. Can be used as a webmaster as it has access to the entire `/content` tree.	
`administrators`	Group	Group that gives administrator rights to all its members. Only admin is allowed to edit this group. Has full access rights.	
`contributor`	Group	Basic privileges which allow the user to write content (as in functionality only). Does not allocate any privileges to the /content tree - these must be specifically allocated for the individual groups or users.	
`everyone`	Group	Every user in CQ WCM is a member of the group **`everyone`**, even though you may not see the group or the membership relation in all tools. This group can be thought of as the “default rights” as it can be used to apply permissions for everyone, even users that will be created in the future.	**Do not modify or delete this group.** Modifying this account has additional security implications.
`privilege-administrators`	Group	Allows a user to edit the privileges on the account of a different user.	
`surfer`	Group	Group that allows the members to read content.	
`tag-administrators`	Group	Group that is allowed to edit tags.	
`uploader`	Group	Privileges needed to allow the smart uploading widget to write to `/tmp`.	

Copyright 1993-2009 Day Management AG

User ID	Type	Description	Recommendation
`user-administrators`	Group	Authorizes user administration; for example the right to read home-directories.	
`workflow-editors`	Group	Group that is allowed to create and modify workflow models.	
`workflow-users`	Group	A user participating in a workflow must be member of group workflow-users. This gives him or her full access to: `/etc/workflow/`instances so that he or she can update the workflow instance. The group is included in the standard installation, but you must manually add your users to the group.	

7.2.4 Permissions

Permissions define who is allowed to perform which actions on a resource. The permissions are held as access control lists.

Permissions allow you to either **`Allow`** or **`Deny`** the actions.

7.2.4.1 Actions

Actions can be performed on a page (resource). For each page in the hierarchy, you can specify which action the user is allowed to take on that page. See the section called “Permissions”.

The following actions are available:

Table 7.2. Actions

Action	Description
Read	The user is allowed to read the page and any child pages.
Modify	The user can modify existing content on the page and on any child pages.
Create	The user can: • create new paragraphs on the page or on any child page. • create a new page, or child page, if the Privilege **`Modify Hierarchy`** has also been granted.
Delete	The user can: • delete existing paragraphs from the page or any child page. • delete a page, or child page, if the Privilege **`Modify Hierarchy`** has also been granted.
Read ACL	The user can read the access control list of the page or child pages.
Write ACL	The user can modify the access control list of the page or any child pages.

Copyright 1993-2009 Day Management AG

7.2.4.2 Access Control Lists and how they are evaluated

CQ WCM uses *Access Control Lists* (ACLs) to organize the permissions being applied to the various pages.

Access Control Lists are made up of the individual permissions and are used to determine the order in which these permissions are actually applied. The list is formed according to the hierarchy of the pages under consideration. This list is then scanned bottom-up until the first appropriate permission to apply to a page is found.

Table 7.3. Permission States

Action	Description
Allow	CQ WCM allows the user to perform the action on this page or on any child pages.
Deny	CQ WCM does not allow the user to perform the action on this page nor on any child pages. See Section 7.2.4.2, “Access Control Lists and how they are evaluated” for further details of how these interact.
Inherit	The permissions are inherited from a parent page at some point higher up the tree.

Important

If no permissions are defined for a page (neither direct nor inherited) then all actions are denied.

The following are recommendations about managing access control lists:

- Do not assign permissions directly to users. Assign them only to groups.

  This will simplify the maintenance, as the number of groups is much smaller than the number of users, and also less volatile.

- Use **`Deny`** sparingly. As far as possible use only **`Allow`**.

  Using deny can cause unexpected effects if the permissions are applied in a different order to that expected. If a user is a member of more than one group, the Deny statements from one group may cancel the Allow statement from another group, or vice versa. It is hard to keep an overview when this happens and can easily lead to unforeseen results, whereas Allow assignments do not cause such conflicts.

  Day recommends that you work with Allow rather than Deny see the section called “Best Practices”.

Before modifying either permission, be sure you understand how they work and inter-relate. See the CRX documentation to illustrate how CQ WCM evaluates access rights and Examples on setting up access control lists.

Note

For Communiqué 4 users: Whereas Communiqué 4 ACLs were user-based, CQ5 ACLs are resource-based. Pre- and post-ACLs do not apply in CQ5.

7.2.5 Privileges

Privileges are similar to permissions, but are allocated to allow access to functionality within the application.

You can **`Allow`**/**`Grant`** or **`Deny`** them.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

Within the standard installation of CQ WCM the privilege to modify the hierarchy can be allocated. This allows the user to create and/or delete pages - if the relevant action has been allocated the correct permission.

Depending on your installation, additional privileges may be available.

7.2.6 Replication Privilege

A special form of privilege, **`Replication Privilege`** is highlighted (with its own tab) in CQ WCM as replication is integral to the whole concept of CQ WCM.

For each page you can either **`Allow`** or **`Deny`** a user's right to replicate content to another environment. As with permissions the privilege is also applied to any child pages.

Note

Replication privileges can also be combined as access control lists, so as with permissions it is recommended to work with **`Allow`** rather than **`Deny`** see the section called “Best Practices”..

7.2.7 Impersonating another User

With the **`Impersonate`** functionality a user can work “on behalf of” another user.

This means that a user account can specify other accounts which can operate with their account. In other words, if user-B is allowed to impersonate user-A, then user-B can take actions using the full account details of user-A.

This allows the impersonator accounts to complete tasks as if they were using the account they are impersonating; for example, during an absence or to share an excessive load short-term.

Important

If an accounts impersonates another it is very difficult to see. An entry is made in the audit log when the impersonation starts and ends, but the other log files (such as the access log) hold no information about the fact that impersonation has occurred on the events. So if user-B is impersonating user-A all events will look as if they were performed by user-A personally.

7.2.8 Best Practices

The following describes best practices when working with permissions and privileges:

Table 7.4. Best Practices

Rule	Reason
Use Groups.	Don't assign access rights on a user-by-user basis. There are several reasons for this: 1. You have many more users than groups, so groups simplify the structure. 2. Groups help provide an overview over all accounts. 3. Inheritance is simpler with groups. 4. Users come and go. Groups are long-term.
Be Positive.	Always use **`Allow`** statements to specify the group’s rights (wherever possible). Avoid using a Deny statement.

Copyright 1993-2009 Day Management AG

Rule	Reason
	Groups are evaluated in order, and the order may be defined differently per user. In other words: You may have little control over the order in which the statements are implemented and evaluated. If you use only **`Allow`** statements, the order does not matter.
Keep It Simple	Investing some time and thought when configuring a new installation will be well repaid. Applying a clear structure will simplify the ongoing maintenance and administration, ensuring that both your current colleagues and/or future successors can easily understand what is being implemented.
Test	Use a test installation to practice and ensure that you understand the relationships between the various users and groups.
Default Users/ Groups	Always update the Default Users and Groups immediately after installation to help prevent any security issues.

7.3 Configuring the Users and Groups

Users include people using the system and foreign systems making requests to the system.

A group is a set of users.

Both can be configured using the User Administration functionality within the Security Console.

7.3.1 Accessing User Administration with the Security Console

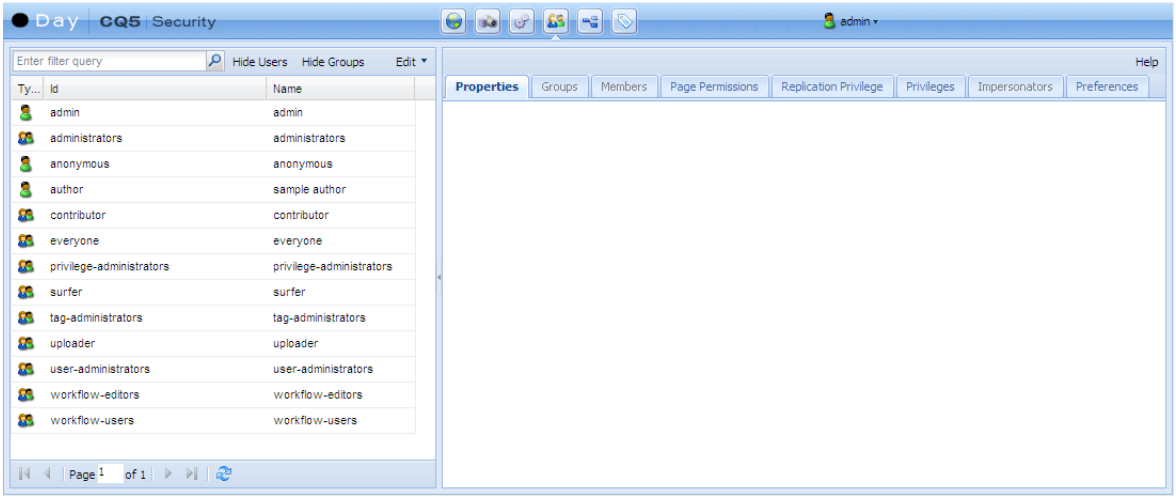
You access all users, groups, and associated permissions using the **`Security`** console. All the procedures described in this section are performed in this window.

To access CQ WCM security, do one of the following:

- From the welcome screen, or various locations in CQ WCM, click the security icon.

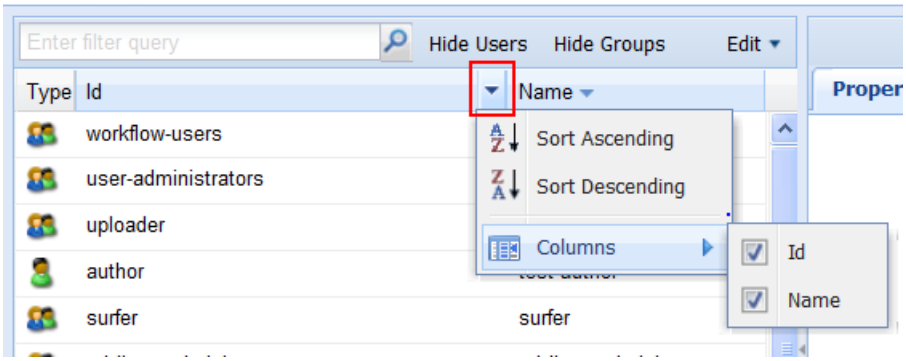
- Navigate directly to `http://localhost:<port>/libs/security/content/admin.html`. Be sure you log in to CQ WCM as an administrator.

The following window displays:



Copyright 1993-2009 Day Management AG

The left tree lists all the users and groups currently in the system, You can select the columns you want displayed, sort the contents of the columns and even change the order in which the columns are displayed by dragging the column-header to a new position.



The tabs provide access to various configurations:

Table 7.5. Security Console

Tab	Description
Filter box	A mechanism for filtering the users and/or groups listed. See the section called “Filtering Users and Groups”.
Hide Users	A toggle switch which will hide all users listed, leaving only groups. See the section called “Hiding Users and Groups”.
Hide Groups	A toggle switch which will hide all groups listed, leaving only users. See the section called “Hiding Users and Groups”.
Edit	A menu allowing you to create and delete users or groups. See the section called “Creating Users and Groups” and the section called “Deleting Users and Groups”.
Properties	Lists information about the user or group that can include email information, a description, and name information. Also allows you to change a user's password. See the section called “Creating Users and Groups”, the section called “Modifying User and Group Properties” and the section called “Changing a User Password”.
Groups	Lists all groups that the selected user or group belongs to. You can assign the selected user or groups to additional groups, or remove them from groups. See the section called “Groups - adding a User or Group to a Group”.
Members	Available for groups only. Lists the members of a particular group. See the section called “Members - adding Users or Groups to a Group”.
Page Permissions	Lets you control the permissions related to particular pages. You can allocate permissions to a user or group. See the section called “Setting Page Permissions”.
Replication Privilege	Replication privileges allow the user to replicate content to another environment (usually from author to publish). You grant replication privileges according to a path. Privileges can be allocated to a user or group. See the section called “Setting Replication Privileges”.
Privileges	Lets you allocate privileges, such as hierarchy modification, which gives the ability to create and delete pages. See the section called “Setting Privileges”.
Impersonators	Lets another user impersonate the account. Useful when you need a user to act on behalf of another user. See the section called “Setting User and Group Preferences”.
Preferences	Sets preferences for the group or user. For example, language preferences. See the section called “Impersonating Users”.

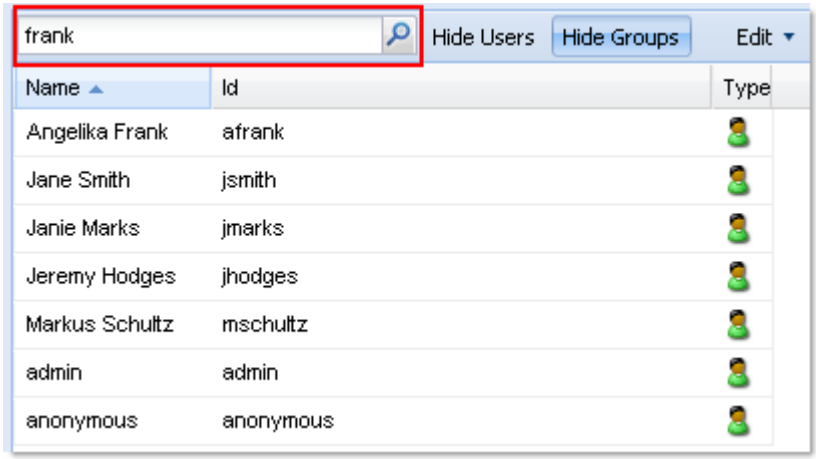
Copyright 1993-2009 Day Management AG

7.3.2 Filtering Users and Groups

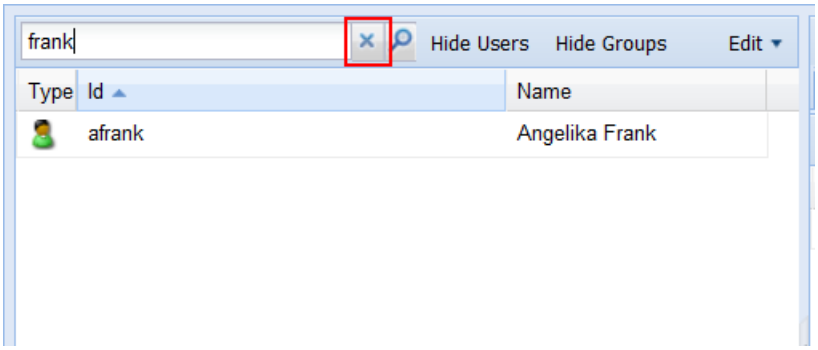
You can filter the list by entering a filter expression, which hides all the users and groups that do not match the expression. You can also hide users and groups by using the **Hide User** and **Hide Group** buttons. See the section called “Hiding Users and Groups”.

To filter users or groups:

1. In the left tree list, type your filter expression in the space provided. For example, entering **min** displays all users and groups containing this string.
2. Click the magnifying glass to filter the list.



3. Click the **x** when you want to remove all filters.



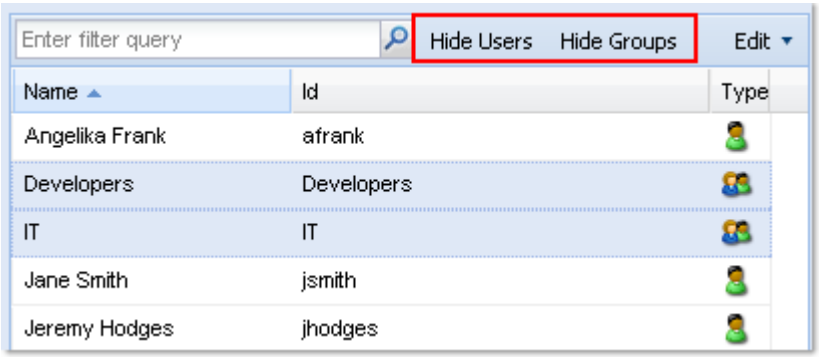
7.3.3 Hiding Users and Groups

Hiding users or groups is another way to filter the list of all users and groups in a system. There are two toggle mechanisms. Clicking **Hide User** hides all users from view and clicking **Hide Groups** hides all groups from view (you cannot hide both users and groups at the same time). To filter the list by using a filter expression, see Filtering users and groups.

To hide users and groups:

1. In the security window, click **Hide Users** or **Hide Groups**.

Copyright 1993-2009 Day Management AG

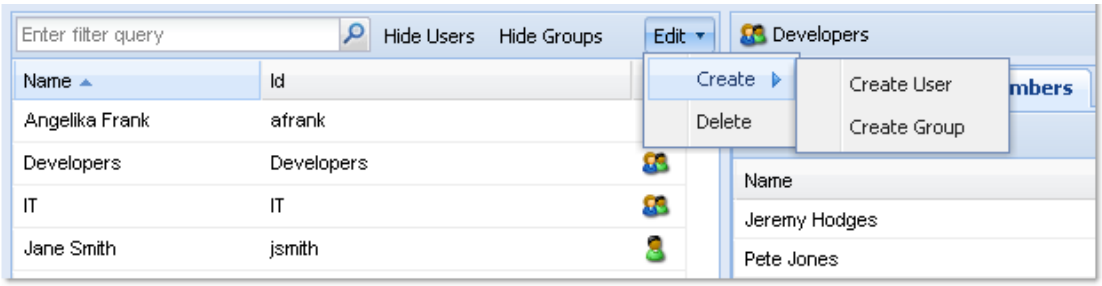


2. To make either users and/or groups reappear, click the corresponding button again.

7.3.4 Creating Users and Groups

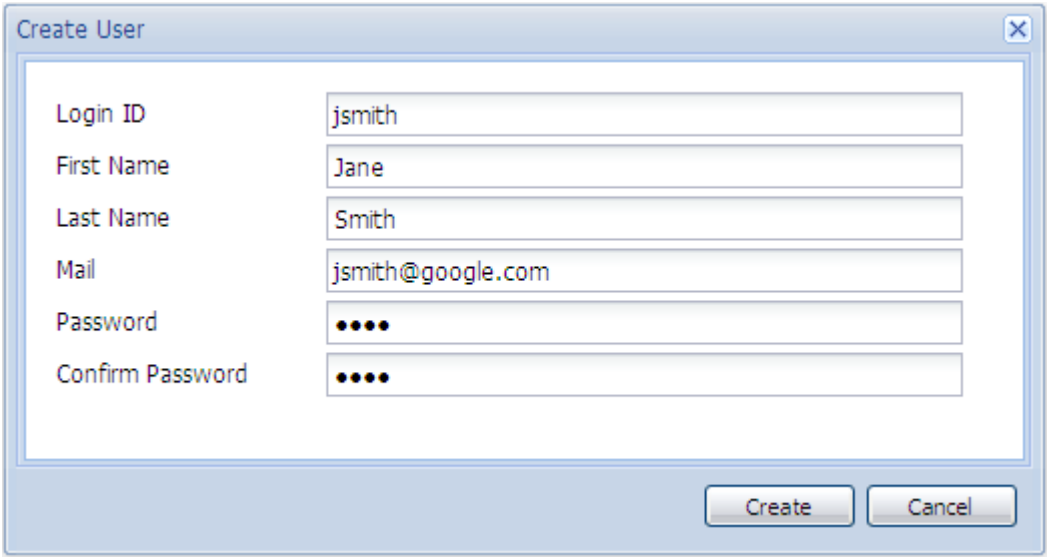
To create a new user or group:

1. In the **Security** window tree list, click **Edit** and then either **Create User** or **Create Group**.



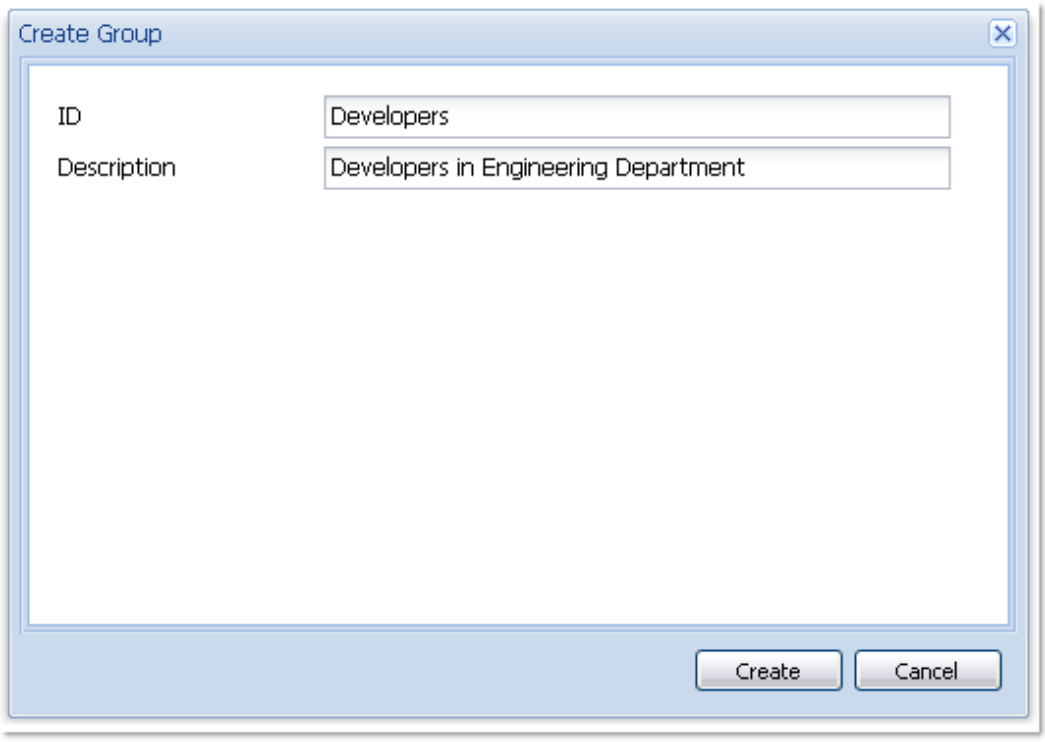
2. Enter the required details, according to whether you are creating a user or a group.

   a. If you select **Create User**, you enter the Login ID, first and last name, email address and a password.



   b. If you select **Create Group**, you enter a group ID and an optional description.

Copyright 1993-2009 Day Management AG



3. Click **Create**. The user or group you created appears in the tree list.

7.3.5 Deleting Users and Groups

To delete a user or group:

1. In the **Security** window, select the user or group you want to delete. If you want to delete multiple items, **Shift+click** or **Control+click** to select them.
2. Click **Edit**, then select **Delete**. CQ WCM asks whether you want to delete the user or group.
3. Click **OK** to confirm or **Cancel** to cancel your action.

7.3.6 Modifying User and Group Properties

To modify user and group properties:

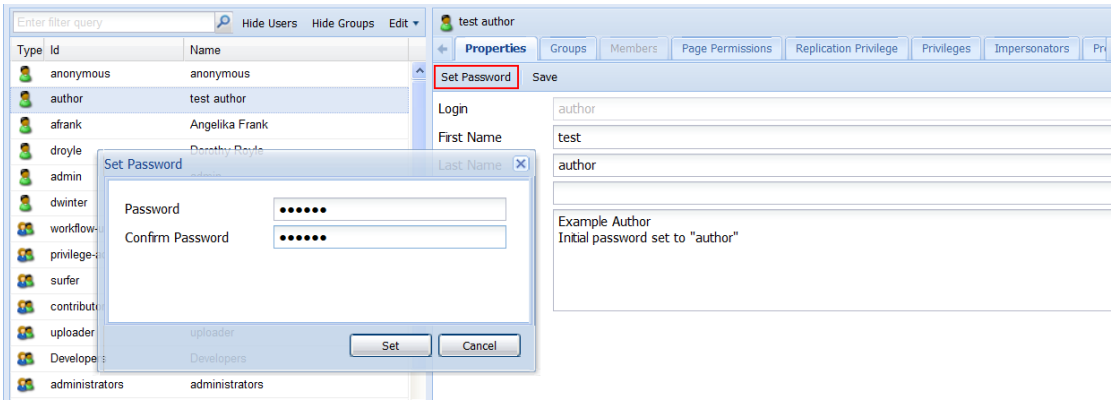
1. In the **Security** window, **double-click** the user or group name you want to modify.
2. Click the **Properties** tab, make the required changes and click **OK**.

7.3.7 Changing a User Password

To modify a user's password:

1. In the **Security** window, **double-click** the user name you want to change the password for.
2. Click the **Properties** tab (if not already active).
3. Click **Set Password**, a new dialog will open where you can enter the new password:

Copyright 1993-2009 Day Management AG



4. Enter the new password twice; as they are not displayed in clear text this is for confirmation - if they do not match, the system will show an error.

5. Click **`Set`** to activate the new password for the account.

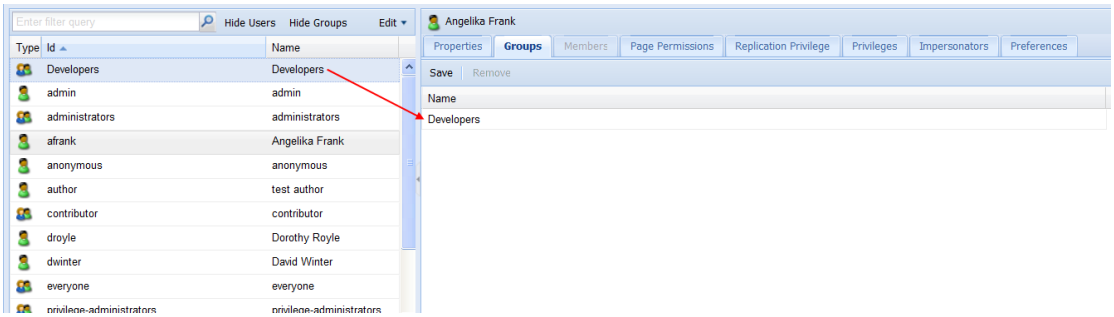
7.3.8 Groups - adding a User or Group to a Group

The Groups tab shows you which groups the current account belongs to. You can use it to add the selected account to a group:

1. **`Double-click`** the name of the account (user or group) that you want to assign to a group.

2. Click the **`Groups`** tab. Now you will see a list of groups that the account already belongs to.

3. In the tree list, click the name of the group you want to add to the account to and drag it to the **`Groups`** pane. (If you want to add multiple users, **`Shift+click`** or **`Control+click`** those names and drag them.)



7.3.9 Members - adding Users or Groups to a Group

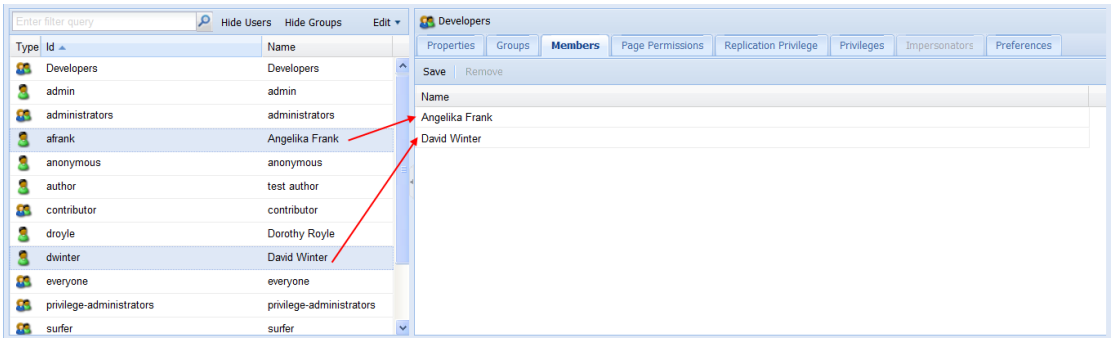
The Members tab only works for groups and shows you which users and or groups belong to the current group. You can used it to add accounts to a group:

1. **`Double-click`** the name of the group you want to add members to.

2. Click the **`Members`** tab. Now you will see which users and/or groups already belong to this group.

3. In the tree list, click the name of the user you want to add to the group and drag it to the **`Members`** pane. (If you want to add multiple users, **`Shift+click`** or **`Control+click`** those names and drag them.)

Copyright 1993-2009 Day Management AG

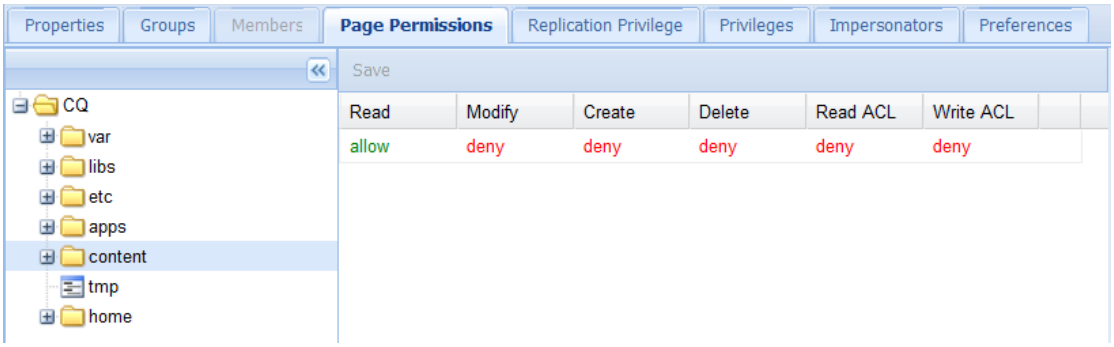


4. After you have added all the users to your group, click **Save**.

7.3.10 Setting Page Permissions

To add, modify or delete page permissions, which enables you to allow or deny the right to perform actions on specific resources:

1. **Double-click** the name of the user or group you want to add page permissions to.
2. Click the **Page Permissions** tab. The tree map will open.
3. Select the page you want to add permissions for (or modify, or delete):



4. **Double-click** the permission state that you want to change. A drop down list will show the possible states. See the section called “Permissions”.
5. Change as required and click **Save**.

7.3.11 Setting Replication Privileges

Replication privilege is the right to publish content, and it can be set for groups and users.

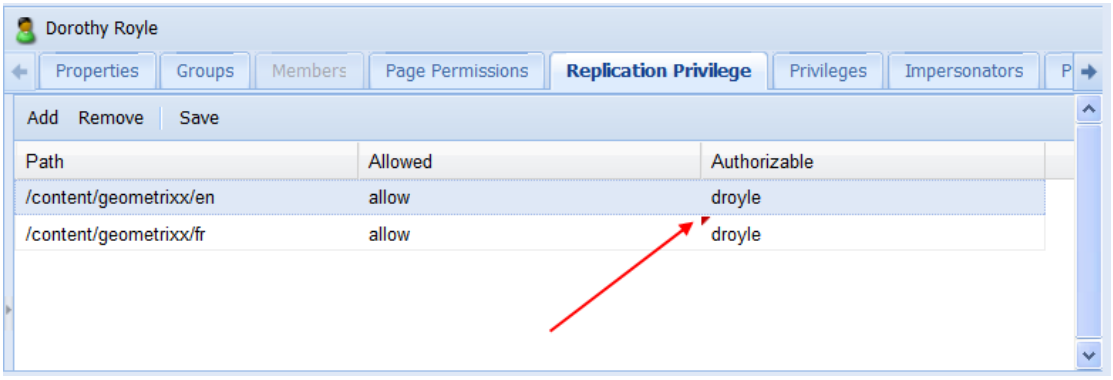
To set replication rights:

1. Select the user or group from the list, double-click to open, and click **Replication Privilege**.
2. Click **Add**. CQ WCM opens a tree list of the site.
3. Navigate to the page you want to give the user or group replication privileges to and double-click for it to be selected and listed in the main pane.

   The red corner indicates that the item listed has not been saved yet.

   The Authorizable column shows through which user or group the permissions are being applied.

Copyright 1993-2009 Day Management AG



4. Click **Save** to save your changes.

Note

- Any replication rights applied to a group apply to all the users in that group.
- A user's replication privileges supersedes a group's replication privileges.
- The Allow replication rights have a higher precedence than the Deny replication rights. See Section 7.2.4.2, "Access Control Lists and how they are evaluated" for more information.

7.3.12 Setting Privileges

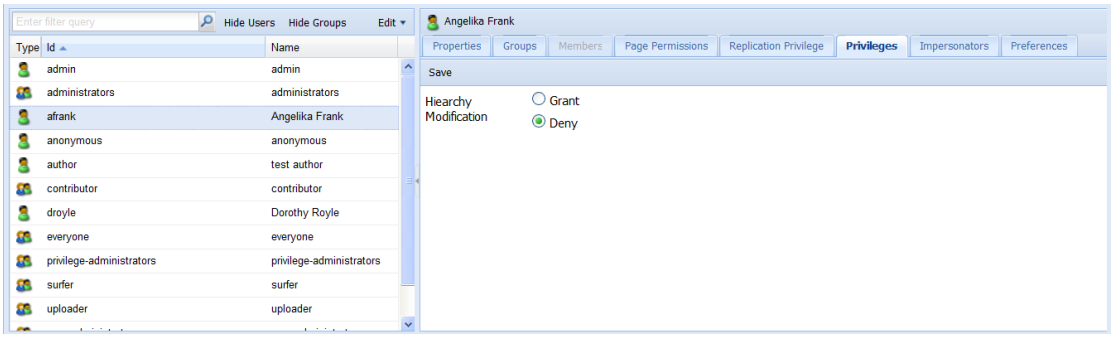
Privileges are used to assign access to the functionality within the application.

Standard privileges included in the installation of CQ WCM are for modifying the hierarchy; in other words, creating or deleting pages.

Note

The list of privileges available may be extended for your project.

1. Select the user or group from the list, double-click to open, and click **Privileges**.
2. The privileges available will be shown. Select **Grant** or **Deny** as required.



3. Click **Save** to save your changes.

7.3.13 Impersonating Users

You can specify one or more users that are allowed to impersonate the current user. This means they can switch their account settings to those of the current user and act on behalf of this user.

Copyright 1993-2009 Day Management AG

Note

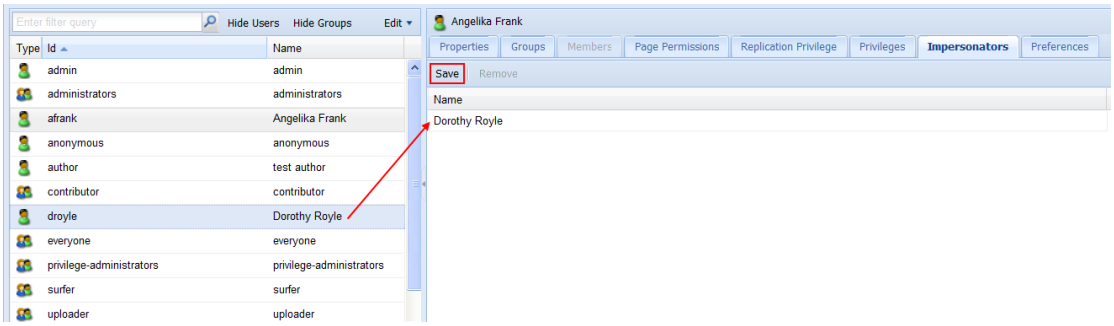
Use this function with caution as it may allow users to perform actions that their own user cannot. When impersonating a user, users are notified that they are not logged in as themselves.

There are various scenarios when you may want to use this functionality, including:

- If you are out of the office, you can let another person impersonate you while you are away. By using this feature, you can make sure that somebody has your access rights and you do not need to modify a user profile or give out your password.
- You can use it for debugging purposes. For example, to see how the Web site looks for a user with restricted access rights. Also, if a user complains about technical problems, you can impersonate that user to diagnose and fix the problem.

To impersonate an existing user:

1. In the tree list, select the name of the person who you want to assign other users to impersonate. **`Double-click`** to open.
2. Click the **`Impersonate`** tab.

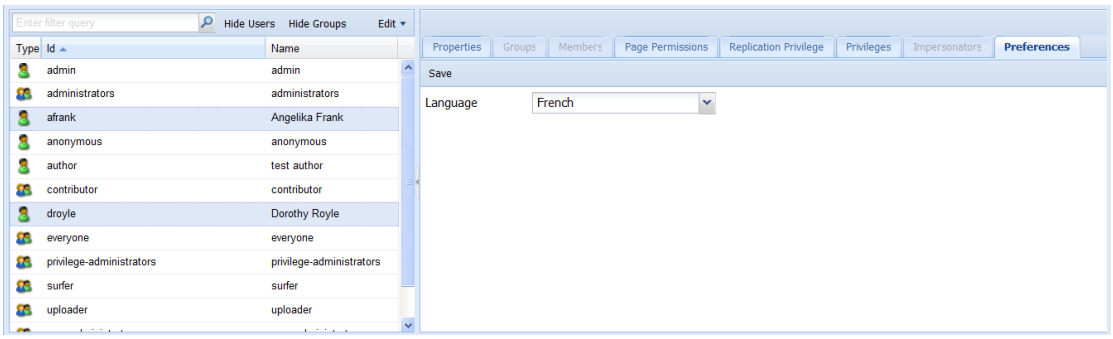


3. Click the user you want to be able to impersonate the selected user. Drag the user (who will impersonate) from the list to the **`Impersonate`** pane. The name appears in the list.
4. Click **`Save`**.

7.3.14 Setting User and Group Preferences

To set user and group preferences:

1. Select the user or group whose preferences you want to change in the left-hand tree. To select multiple users or groups, **`Ctrl+click`** or **`Shift+click`** your selections.
2. Click the **`Preferences`** tab.



3. Make changes, as necessary to the group or user preferences and click **`Save`** when finished.

Copyright 1993-2009 Day Management AG

8 Working with Workflows

CQ5 encompasses several applications which are designed to interact and complement each other. In particular, the Workflow Engine can be used in tight conjunction with several of the other applications.

For example, within CQ5, Web Content Management (CQ WCM) is key. This enables you to generate and publish pages to your website. This functionality is often subject to organizational processes, including steps such as approval and sign-off by various participants. These processes can be represented as workflows, which in turn can be defined within CQ, then applied to the appropriate content pages.

This section covers using Workflows to:

- create and edit a new workflow
- start an instance of the workflow by applying it to a page of content
- complete a step requiring user action
- take additional actions on a workflow; for example, suspend, resume, terminate
- monitor workflow instances
- investigate the history of archived workflows (which have finished, or been terminated)
- automatically launch workflows when nodes within the repository are modifed (for example, to load digital assets)

8.1 Authorization needed for working with Workflows

Actions on workflows can only be undertaken if:

- you are working with the `admin` account
- the account has been assigned to the default group **`workflow-users`**, which holds all the privileges necessary for your users to perform workflow actions.

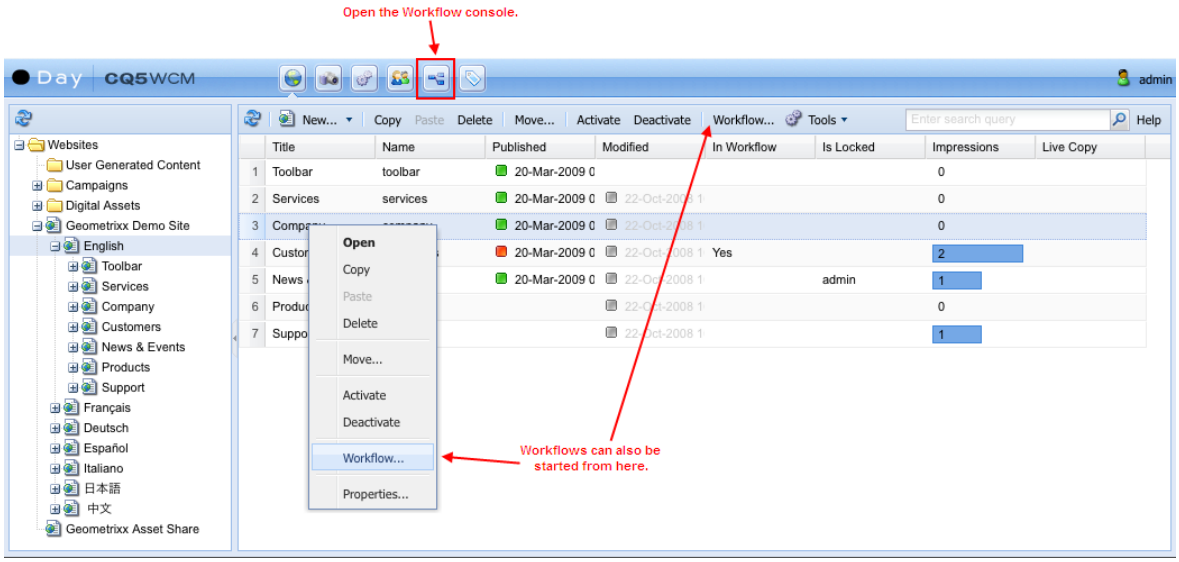
8.2 The Workflow Console

The Workflow console is the centralized location for workflow management in CQ. It can be accessed via the main tab icon:

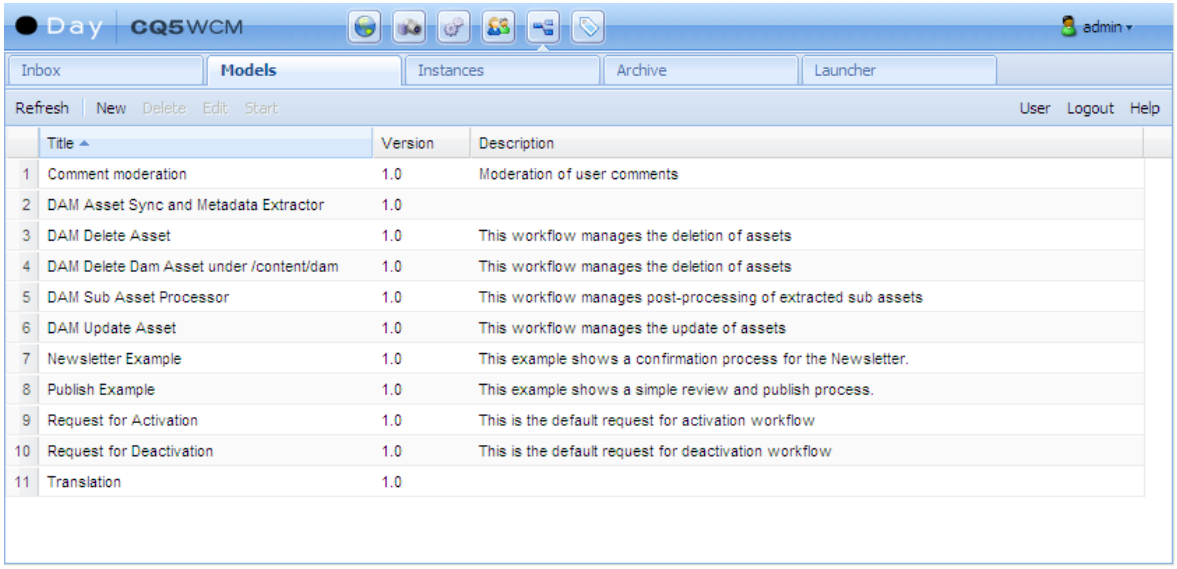
Note

Workflows can also be started from the **`Workflow...`** menu item, the drop-down menu on a page item, and from the sidekick when editing a page)

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Within the console there are 5 tabs:



	Title	Version	Description
1	Comment moderation	1.0	Moderation of user comments
2	DAM Asset Sync and Metadata Extractor	1.0	
3	DAM Delete Asset	1.0	This workflow manages the deletion of assets
4	DAM Delete Dam Asset under /content/dam	1.0	This workflow manages the deletion of assets
5	DAM Sub Asset Processor	1.0	This workflow manages post-processing of extracted sub assets
6	DAM Update Asset	1.0	This workflow manages the update of assets
7	Newsletter Example	1.0	This example shows a confirmation process for the Newsletter.
8	Publish Example	1.0	This example shows a simple review and publish process.
9	Request for Activation	1.0	This is the default request for activation workflow
10	Request for Deactivation	1.0	This is the default request for deactivation workflow
11	Translation	1.0	

Inbox
: Lists workflows awaiting action in your inbox. You can then take action as required.

Models
: Lists the workflow models currently available. Here you can create, edit or delete workflow models.

Instances
: Shows you details of workflow instances which are currently active. These instances are also version dependent.

Archive
: Enables you to access details of workflow instances which have terminated, for whatever reason.

Launcher
: Allows you to define a workflow to be launched if a specific node has been updated.

Copyright 1993-2009 Day Management AG

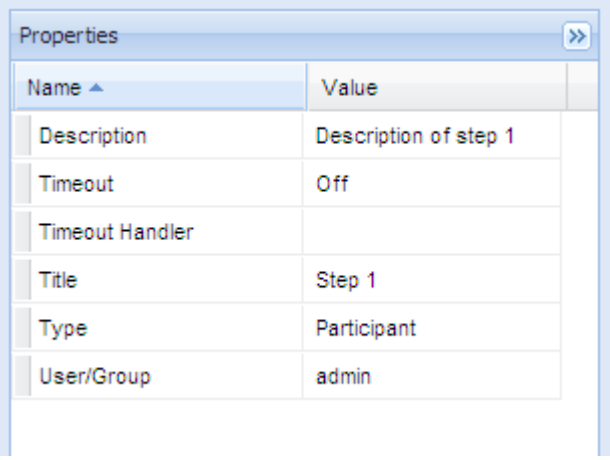
8.3 The types of Workflow Steps available

To build your workflow CQ provides various steps types which can be combined, and extended with scripts to provide the functionality and control you require.

8.3.1 Participant Step

A participant step enables you to assign ownership for a particular action. The workflow will only proceed when the user has manually acknowledged the step. This is used when you want someone to take an action on the workflow; for example, a review step.

Although not directly related, user authorization must be considered when assigning an action; the user must have access to the page.



The following properties are available:

Description
: A description of the step.

Timeout
: The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler
: The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title
: You can enter your own title for the step.

Type
: Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

User/Group
: A drop down selection box will allow you to navigate and select a user or group.

  If you assign the step to a specific user, then only this user can take action on the step.

  If you assign the step to an entire group, then when the workflow reaches this step all users in this group will have the action in their **`Workflow Inbox`**.

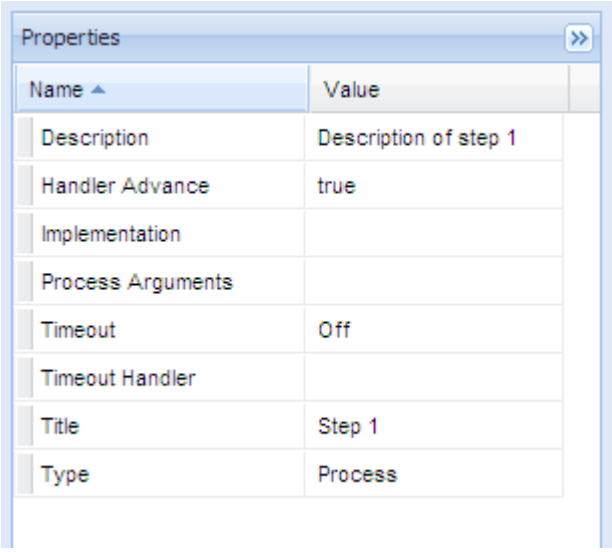
  See Delegating a Participant Step for more information on how this can affect your workflow.

Copyright 1993-2009 Day Management AG

8.3.2 Process Step

A process step allows you to specify scripts to be executed.

This is used when you want automated processing to occur; for example to trigger an external application.



The following properties are available:

Description
: A description of the step.

Handler Advance
: If **`true`** a handler will automatically *advance* the workflow to the next step after execution. If **`false`**, the implementation script must handle this.

Implementation
: You can select the script to be executed from a drop down list.

Process Arguments
: You can define arguments to be passed to the process.

Timeout
: The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler
: The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title
: You can enter your own title for the step.

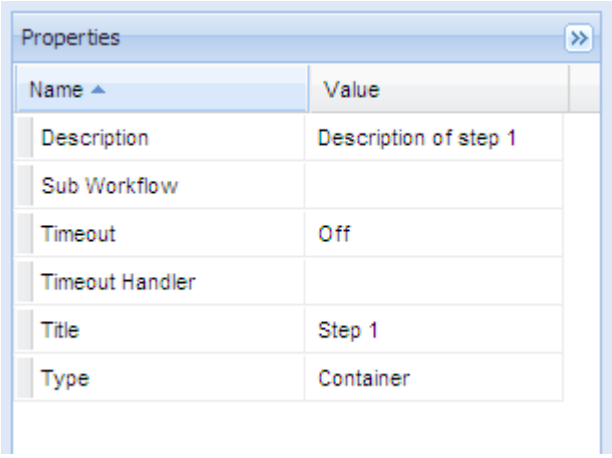
Type
: Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

8.3.3 Container Step

A container step enables you to connect workflows, by referencing a child workflow.

This can allow you to reuse a workflow (or sub-workflow); for example a translation process which is used in multiple editing workflows.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



The following properties are available:

Description
: You can enter a description of the step.

Sub Workflow
: This references a sub workflow.

Timeout
: The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler
: The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title
: You can enter your own title for the step.

Type
: Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

8.3.4 AND Split

An **`AND Split`** creates a split in the workflow; both branches will be active. This enables you to introduce multiple processing paths into the workflow; for example allowing certain review steps to occur in parallel, thus saving time.

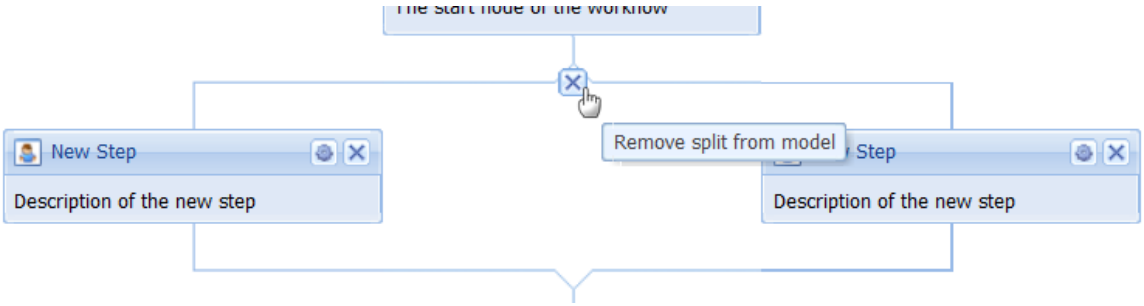
Selecting this will add two branches to the workflow, each with a **`Participant`** step:

After creating such an instance you must edit both of the **`New Step`** instances. You can then add extra process, participant or container steps to either branch as required.

To delete an **`AND Split`**, click the delete icon

that appears when you position your mouse over the branch split (or join):

Copyright 1993-2009 Day Management AG



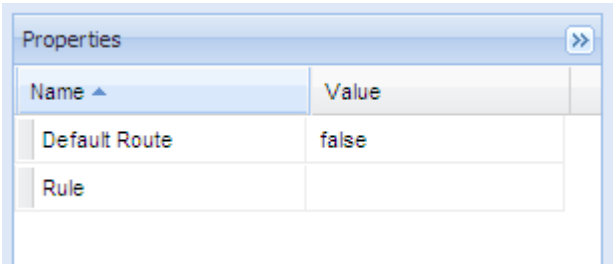
8.3.5 OR Split

Create a split in the workflow, whereby only one branch is active. This allows you to introduce conditional processing paths into your workflow.

Selecting this adds two branches to the workflow, with a **`New Step`** in each branch:

The edit icons

on each branch allow you to define when this branch is used:



You can define:

Default Route
: You can define which branch is followed if no rules have been defined on either branch, or neither are fulfilled. You cannot set both branches to the same value.

Rule
: Here you can define the path to a script that contains the logic controlling whether a particular branch will be activated.

  For example, if you reference the sample script `/etc/workflow/scripts/rule-false.ecma` then false will always be returned:

```
function check() {
    return false;
}
```

After creating such an instance you must edit both of the **`New Step`** instances. You can then add extra process, participant or container steps to either branch as required.:

Copyright 1993-2009 Day Management AG

As with **AND Split**, to delete an **OR Split** click the delete icon

that appears when you position your mouse over the branch split (or join).

8.4 Creating a Workflow

First, you must create your workflow. You can then apply an instance of this (version dependent) when managing your website.

Important

Actions on workflows can only be undertaken if:

- you are working with the `admin` account
- the account has been assigned to the default group **workflow-users**, which holds all the privileges necessary for your users to perform workflow actions.

Note

For simplicity, the following examples have all been made using the `admin` account.

8.4.1 Creating a new Workflow Model

The actual creation is a small step - a skeleton workflow (with 3 default steps) will be created.

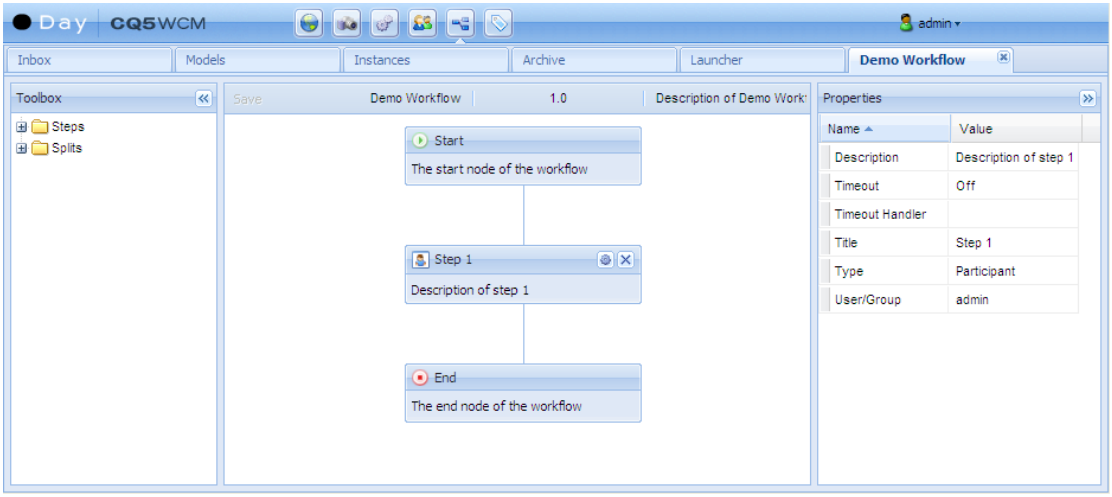
1. Open the Workflow console.
2. From the **Models** tab, select **New** from the top navigation bar. The **New Workflow** dialog opens.
3. Specify the **Title** for your workflow.
4. Click **OK** to save and close the dialog. You return to the **Models** tab, where you see your new workflow in the list.

8.4.2 Editing the Workflow

When you create a new workflow, a skeleton workflow is created with a minimum of steps. For the workflow to become meaningful, you must edit it.

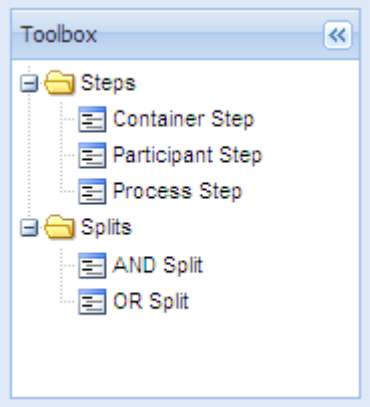
1. Open the Workflow console.
2. From the **Models** tab, select your workflow.
3. Either click **Edit** or **double-click** the name of the workflow. A new tab (named after the workflow) opens for editing and configuring the workflow. This shows 3 panes:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



- **`Toolbox`**

  Lists the **`Step`** and **`Split`** types. Click to display the appropriate list, then use drag the element you want into the appropriate position to build your workflow.

  Note

  A complete explanation of all types of workflow steps and splits, together with their related properties, can be found in the section called “The types of Workflow Steps available”.

- **`Workflow Model`**

  Contains the graphical representation of your workflow. Here you can position the steps and splits, edit the workflow name or description and save changes.

  The **`Save`** button is also located here, as is the **`Model Version`**. The **`Model Version`** is incremented every time the workflow model is updated. This is reflected in the monitoring displays. As multiple versions of a workflow can be in use at any one time, this helps you track the version being used in each instance.

- **`Properties`**

  Allows you to edit properties of the individual steps and splits.

  Note

  A complete explanation of all types of workflow steps and splits, together with their related properties, can be found in the section called “The types of Workflow Steps available”.

Copyright 1993-2009 Day Management AG

Three steps have already been created:

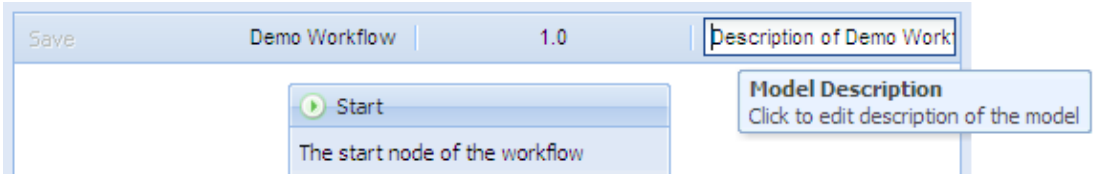
Start
: A mandatory step to start the workflow. This cannot be edited, nor deleted.

Step 1
: A Participant step which is an example. This must be edited, or replaced if required. Further steps can be added.

End
: A mandatory step for every workflow. The End step is used to cleanly terminate the workflow, or to pass control back to the parent workflow in the case of a child (sub-) workflow.

You can either define a full workflow, or a sub-section of a workflow. Sub-workflows can then be referenced by other workflows to form part of a complete workflow. This simplifies the construction of complex workflows, and also allows you to reuse sub-workflows which occur repeatedly.

4. Enter a **`Model Description`** for the workflow (you can also edit the **`Model Title`**) from the center pane. Click on the field to enter edit mode.



5. You can now design your workflow by dragging steps onto the Workflow Model, then configuring the properties.

6. When finished, **`Save`** your model, then close the tab.

8.4.2.1 Example

To illustrate some of the possibilities for creating a workflow, the following example emulates a variation of the **Publish Example** workflow.

1. Edit **`Step 1`** using

   on the step itself.

   a. Enter **`Validate Content`** for the **`Title`** and **`Description`**.

   b. Set the **`User/Group`** to `admin`.

   c. Set the **`Timeout`** to **`Off`** and **`Timeout Handler`** empty.

2. Click **`Splits`** to display the list of split types.

3. Drag an **`Or Split`** onto the workflow and position it between **`Validate Content`** and **`End`**.

   An **`Or Split`** is added to your workflow.

4. Edit the left-hand branch:

   a. Click the

   icon on the actual branch.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

b. Set **Default Route** to true.

c. Click the

icon on **New Step** in the left-hand branch. This will be a **Participant** step.

d. Enter **Cancel Publish** for the **Title** and **Description**.

e. Set the **User/Group** to `admin`.

5. Edit the right-hand branch:

a. Click the

icon on the actual branch.

b. Set **Default Route** to false.

c. Leave the **Rule** empty. This is for demonstration purposes.

d. Click the

icon on **New Step** in the right-hand branch. Change this from a **Participant** to a **Process** step; the properties available will be updated.

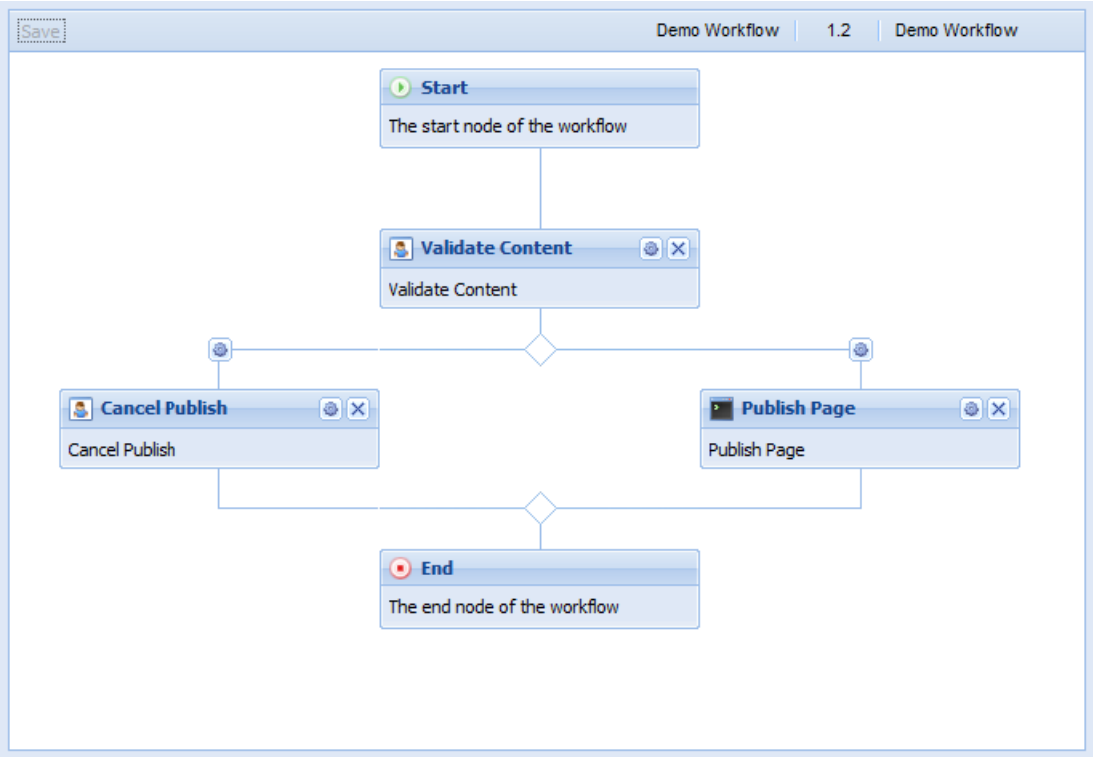
e. Enter **Publish Page** for the **Title** and **Description**.

f. Set the **Handler Advance** to **false**.

g. Select **com.day.cq.wcm.workflow.process.ActivatePageProcess** as the Implementation script. This implementation will publish the selected page to the publisher instances.

6. Now you have specified all steps in your workflow, click **Save**.

Copyright 1993-2009 Day Management AG



7. Finally close the tab and return to the main console.

8.5 Using the Workflow

After you have defined your workflow you will want it to be used when managing your website. The following sections detail the different tasks when using workflows.

8.5.1 Starting the Workflow for an individual page

There are two methods of starting a workflow; from the Workflow Console or the siteadmin:

In either case you need to link a workflow to its payload. The payload (including pages, nodes, resources) will then be subject to this instance of the workflow.

Important

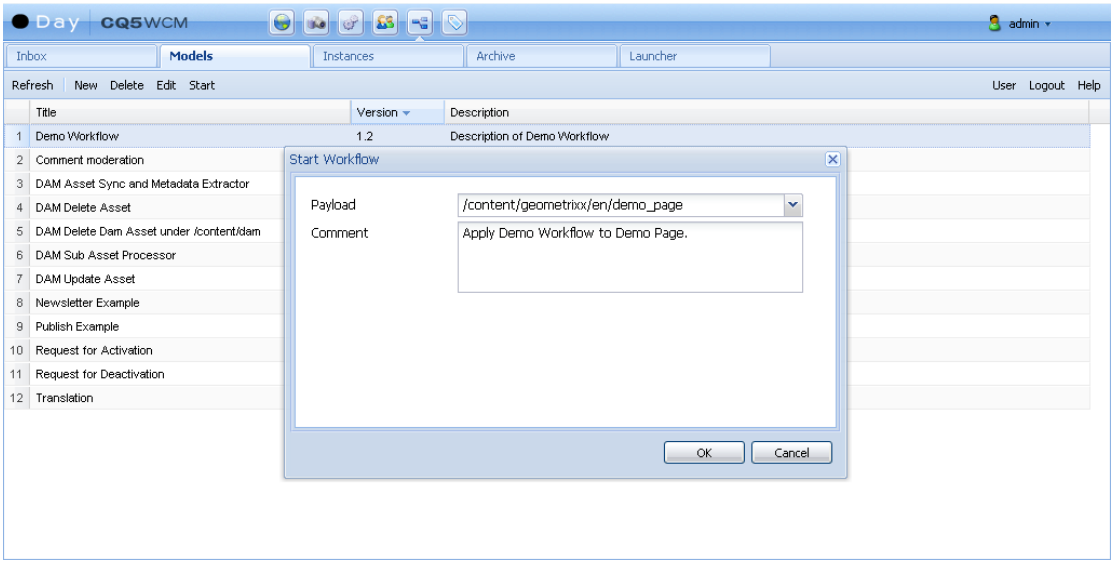
The current version of the workflow model is assigned; if the main copy of the workflow is updated later then the changes will have no impact on the instance assigned.

Procedure 8.1. Starting a workflow from the workflow console

1. Open the Workflow console.
2. From the **`Models`** tab select the required workflow.
3. Click **`Start`** from the top navigation.
4. The **`Start Workflow`** dialog opens allowing you to enter the **`payload`** and a **`comment`**.

   Specify the **`payload`** (includes pages, nodes, resources, and so on) to which the workflow is to be applied. You can use the drop down menu to browse the repository when selecting:

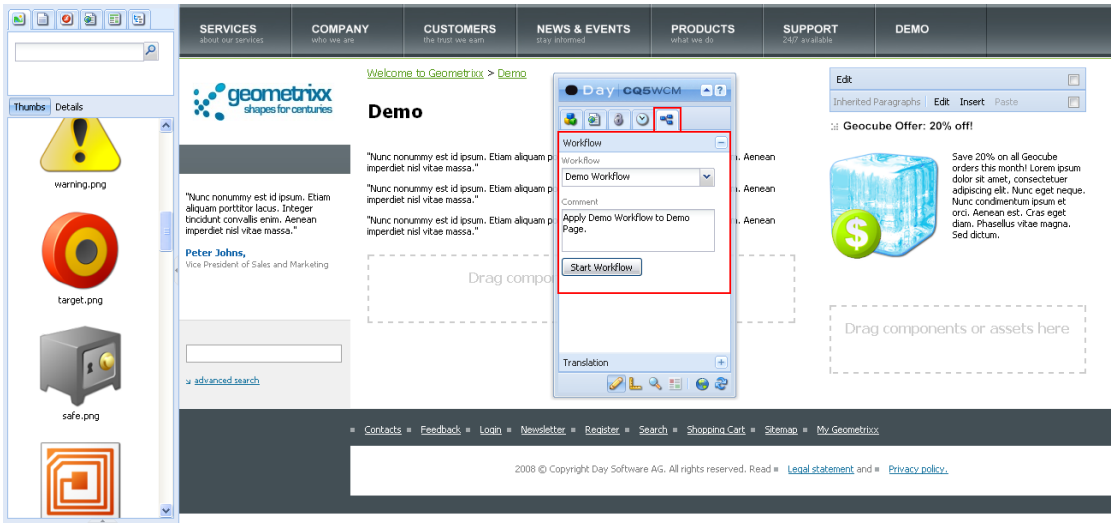
Copyright 1993-2009 Day Management AG



5. Click **OK** to save your selection and start the workflow. Now the workflow is running.

Procedure 8.2. Starting a workflow from the sidekick

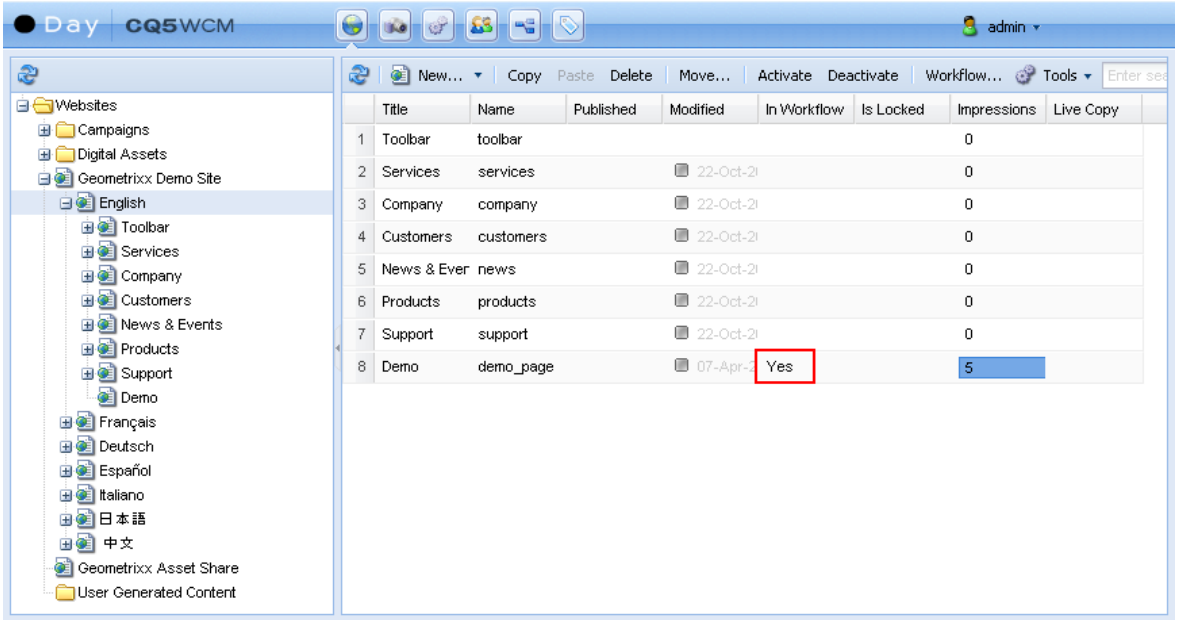
1. Open the siteadmin.
2. Open the required page.
3. Select the Workflow tab from the sidekick.
4. Expand the **Workflow** dialog, allowing you to select the **Workflow** and a enter a **Comment**.



5. Click **Start Workflow** to save your selection and start the workflow. Now the workflow is running.

Once a page has been linked to a workflow it will be indicated in the siteadmin:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



8.5.2 Taking actions on a Participant Step

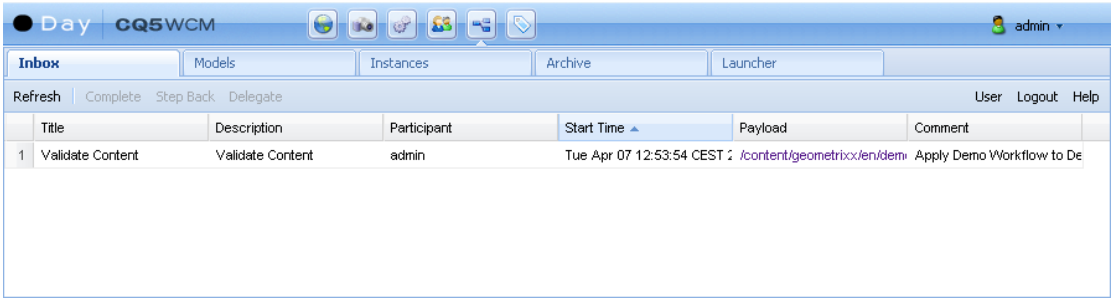
Any participant steps that you have created will be assigned to the specific user or group, who will need to take action:

- When the task is completed they then acknowledge this fact by *completing* the workflow step (see Completing a Participant step).
- If the specific user(s) are unable to take action they can delegate responsibility to another user or group (see Delegating a Participant step).
- If necessary they can step back to repeat a section of the workflow (see Performing Step Back on a Participant step).

8.5.2.1 Selecting a Participant Step to take action

Before you can take any action on a Participant step, you need to select it:

1. Open the Workflow console.
2. Select the **`Inbox`** tab to see when an action is assigned to you. This occurs when a workflow reaches a **Participant step** with your account, or group, specified:


Day CQ5WCM
admin
Inbox Models Instances Archive Launcher
Refresh Complete Step Back Delegate
User Logout Help
Title Description Participant Start Time Payload Comment
1 Validate Content Validate Content admin Tue Apr 07 12:53:54 CEST 2 /content/geometrixx/en/dem Apply Demo Workflow to De

3. Select the entry.

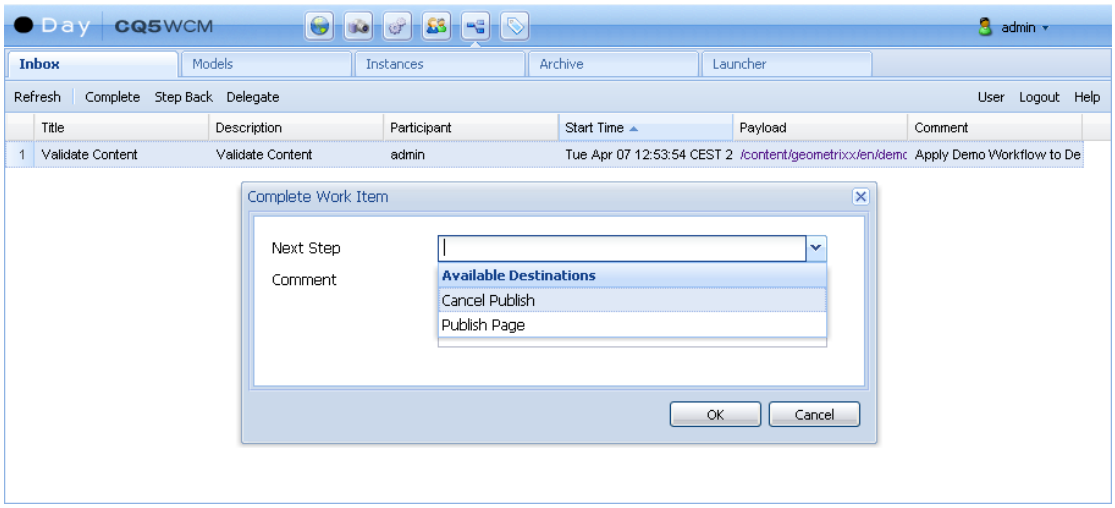
8.5.2.2 Completing a Participant step

After you have taken the action indicated you can complete the workflow step, thus allowing the workflow to continue.

1. Click the **`Complete`** button in the top navigation bar.

Copyright 1993-2009 Day Management AG

2. In the resulting dialog, select the **Next Step**; that is, the step to execute next. A drop down list shows all appropriate destinations. A **Comment** can also be entered.



Note

The number of steps listed depends on the design of the workflow.

3. Click **OK** to confirm the action.

8.5.2.3 Delegating a Participant Step

If a step has been assigned to you, but for any reason you are unable to take action, you can *delegate* the step to another user or group.

1. Click the **Delegate** button in the top navigation bar.

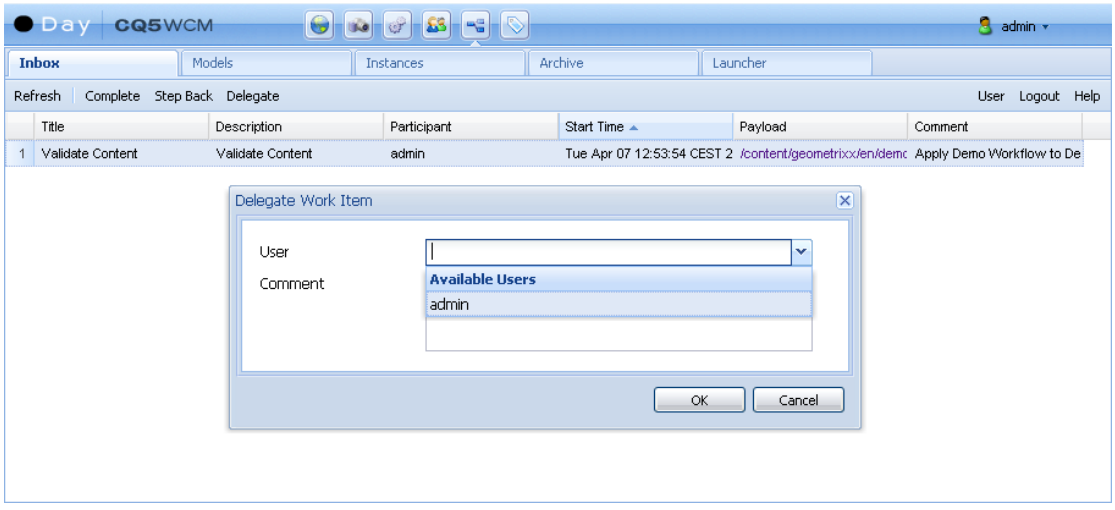
2. In the resulting dialog, select the **User** you want to pass the action to.

   A drop down list shows all appropriate users.

   If the step has been defined with one user, then only this user will be available - the step cannot be delegated to anyone else.

   If a group has been defined, then the list shows the group itself and all individual users within the group. You can delegate to either the entire group, or an individual user within that group.

   A **Comment** can also be entered.



CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

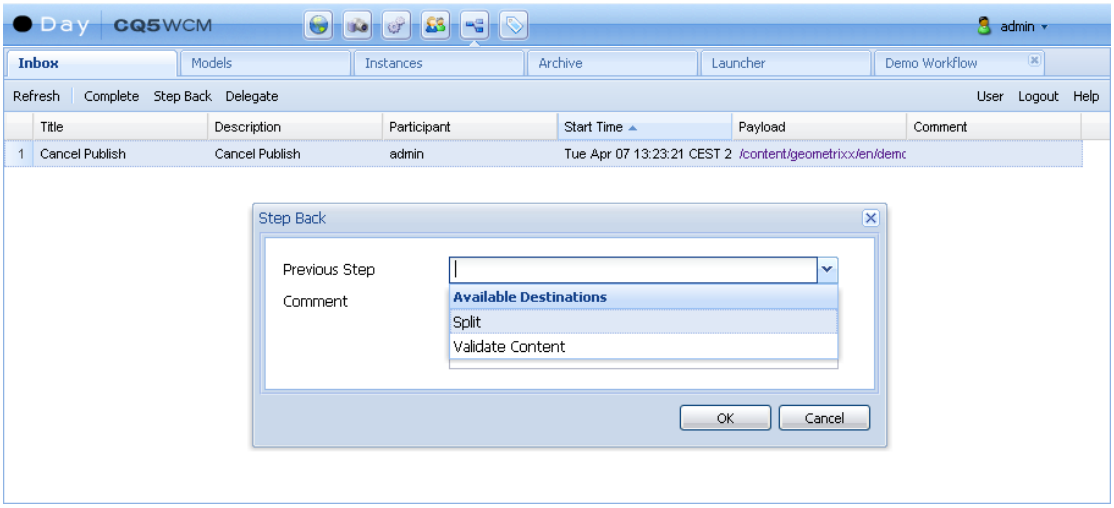
3. Click **OK** to confirm the action.

8.5.2.4 Performing Step Back on a Participant step

If you discover that a step, or series of steps, needs to be repeated you can *step back*. This allows you to select a step that occurred earlier in the workflow for reprocessing. The workflow returns to the step you specify, then proceed from there.

1. Click the **Step Back** button in the top navigation bar.

2. In the resulting dialog, select the **Previous Step**; that is, the step to execute next - even though it is a step that occurs earlier in the workflow. A drop down list shows all appropriate destinations.



Note

The number of previous steps available in the list depends on the design of the workflow.

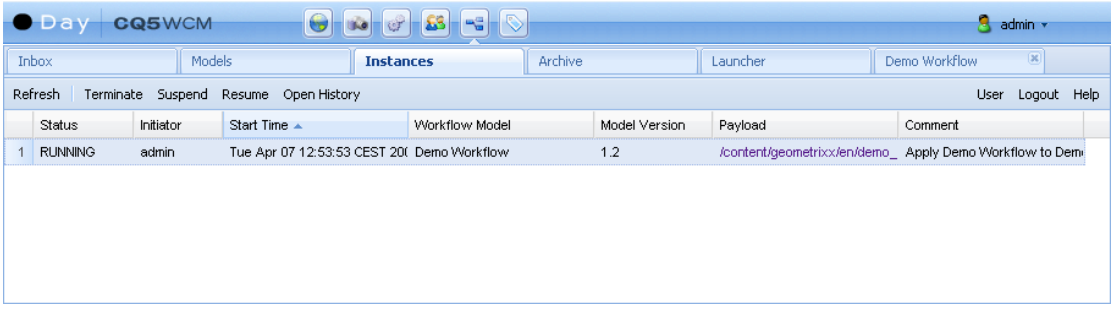
3. Click **OK** to confirm the action.

8.5.3 Suspending, Resuming and Terminating a Workflow instance

Aside from workflow instances that require your immediate action and show up in your Workflow Inbox, you can perform certain other actions on running workflow instances.

1. Open the Workflow console.

2. Select the **Instances** tab. You will see a list of active (neither finished, nor terminated) workflow instances.



3. Select an entry.

Copyright 1993-2009 Day Management AG

4. To suspend the workflow, click the **Suspend** button in the navigation bar. The State changes to **Suspended**. This can be helpful in exceptional cases when you do not want the workflow to proceed; for instance for maintenance.

5. While a workflow is suspended, you can then click **Resume**. This restarts the workflow from where it was suspended, with the same configuration. Again the **State** is updated.

6. To finally terminate the workflow, click **Terminate**. This immediately ends the workflow execution - the state changes to **ABORTED**. A terminated workflow instance cannot be restarted.

The **Instances** tab is not only useful for taking action on running workflows, you can also use it to monitor workflow instances, without necessarily modifying them.

8.5.4 Monitoring the Status of Workflow Instances

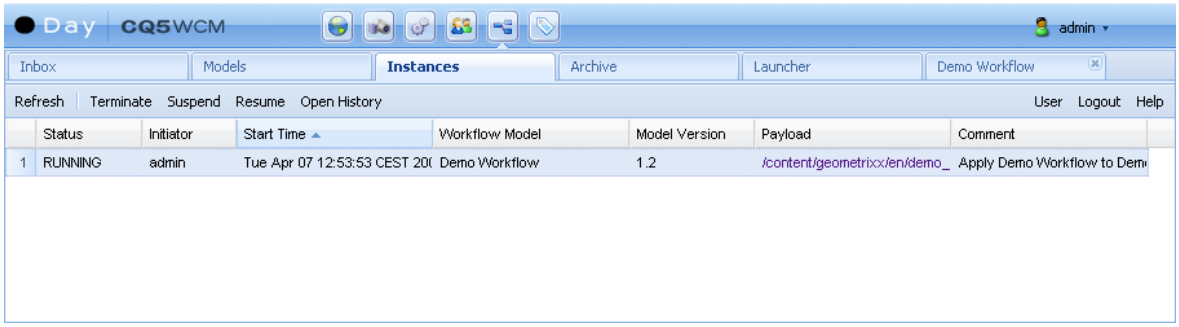
To monitor the status of workflow instances, you can use the **Instances** or **Archive** tabs.

Instances tab
: Shows all running instances.

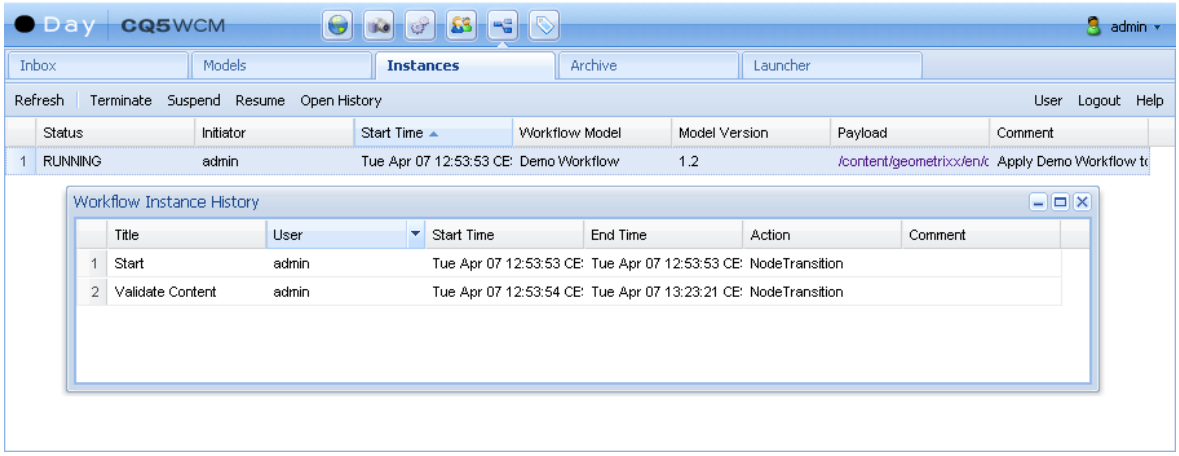
Archive tab
: Shows terminated workflow instances.

8.5.4.1 Monitoring Workflows in progress

From the **Instances** tab you can see the status of a Workflow in progress. A list of the active Models is shown; in this case **RUNNING**:



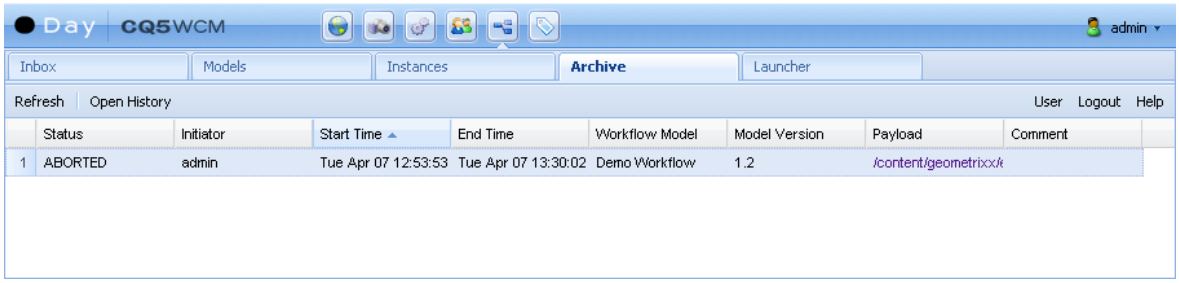
With the **Instances** tab you can take various actions (see Suspending, Resuming and Terminating a Workflow instance) and also **Open History** to show the actions executed to date on the workflow instance:



Copyright 1993-2009 Day Management AG

8.5.4.2 Archived Workflows

After a Workflow instance has finished, for whatever reason (terminated, as below, or after successful completion), it can (only) be seen in the **Archive** tab:



As the workflow has already completed, no further action can be taken on these instances.

However, if you need further details of a completed workflow you can use **Open History**.

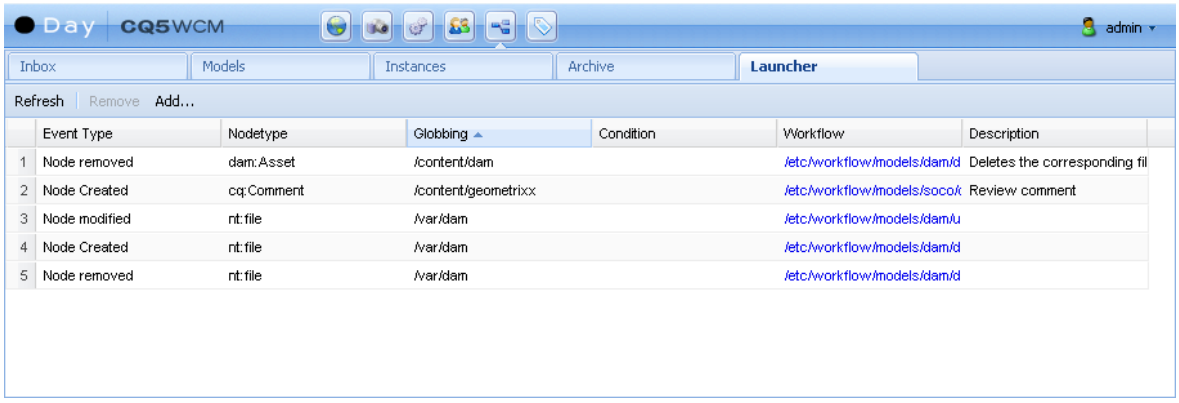
8.6 Using the Workflow Launcher for Node Modifications

The Workflow Launcher, provides one component to monitor all changes in the content repository and launch workflows dependent on the location and resource type of the changed node.

Using the **Launcher** tab you can:

- see the workflows already launched for specific nodes.
- select a workflow to be launched when a certain node/node-type has been modified.
- remove an existing workflow-to-node relationship.

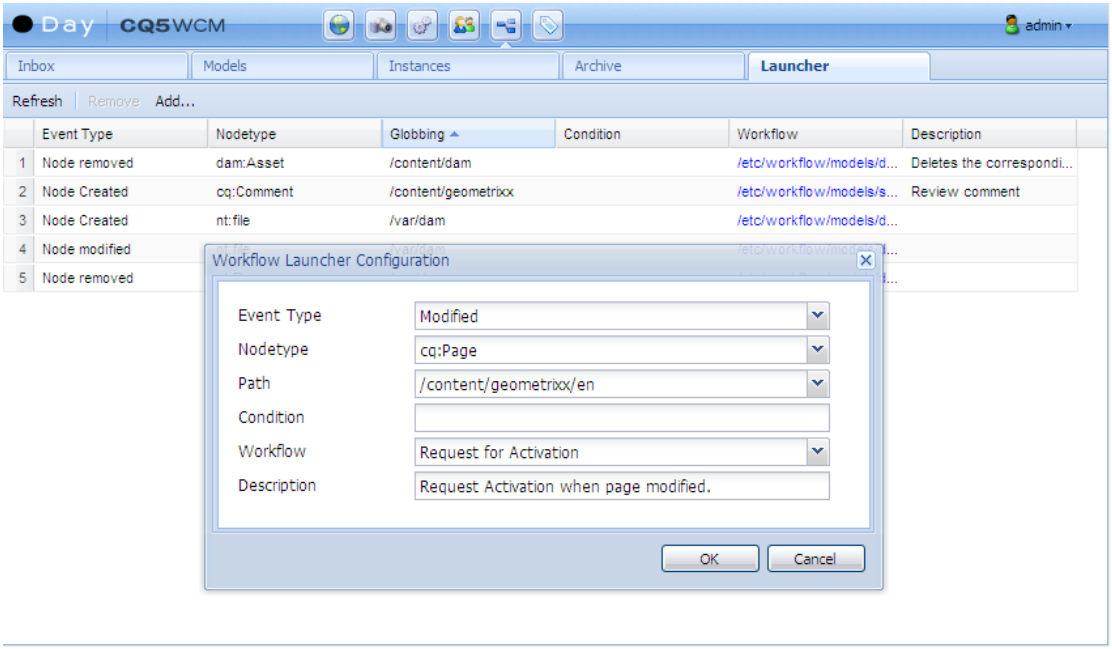
Various definitions are included with the standard installation. These are used for digital asset management and social collaboration tasks:



8.6.1 Adding a Launcher relationship

1. Open the **Workflow** tab.
2. Select the **Launcher** tab.
3. Click **Add...** and configure the new workflow-to-node relationship as required:

Copyright 1993-2009 Day Management AG



Event Type
: Define the event type that will launch the workflow:

- Created
- Modified
- Removed

Nodetype
: Select the nodetype from the drop down list.

Path
: Define the path for which the launch entry is to be applied.

Condition
: Define any conditions which may apply on node property values.

  For example, to check whether a node has a property "*name*" holding the value "*User*" specify `name==User`.

Workflow
: The workflow to be launched when the **`Event Type`** occurs on the **`Nodetype`** and/or **`Path`** under the defined **`Condition`**.

Description
: A description for the relationship.

8.6.2 Removing a Launcher relationship

1. Open the **`Workflow`** tab.
2. Select the **`Launcher`** tab.
3. Click on the entry you want to remove.
4. Click **`Remove`**.

Copyright 1993-2009 Day Management AG

9 Tag Administration

9.1 Some basic facts about tagging in CQ

Tags are a quick and easy method of classifying content within your website:

- In technical terms, a tag is a piece of metadata assigned to a content node (usually a page) within CQ5 WCM. You can also think of them as keywords or labels that you attach to page to help you find it again.
- Within CQ, tags can be grouped into various namespaces. Such hierarchies allow taxonomies to be built. These taxonomies are transparent across CQ WCM, CQ DAM and CQ Social Collaboration.
- There are no restrictions on the tags you can create - though they must be unique within a specific namespace.
- Tags can be created by either the page creator, or viewer. Irrespective of their creator, all forms of tags are made available for selection, both when assigning to a page, or when searching.
- As with pages you can perform the following on tags and namespaces:

  Activate
  : Activate individual tags.

  Activate Tree
  : Activate the selected tree.

  Deactivate
  : Deactivate the selected tags.

- Tags are used by the teaser component, which monitors a user's tag cloud to provide targeted content.
- A major strength of tags is their flexibility. No structure is needed (though namespaces do allow a minimal hierarchy). You can also assign them spontaneously, then search for them as required.

  However, the flexibility can prove to be a disadvantage. It is all too easy to end up with many similar tags relating to basically the same thing; page and pages, impersonator and impersonators are two simple examples. For this reason, CQ allows you to see existing tags before you create a new one, and to group tags into namespaces.

9.2 Top Ten Reasons to use Tagging

Here are the top ten reasons for using tags in CQ5:

1. Tagging makes your life easier by giving you a straightforward way to organize content without *too much* thought.
2. Tags can be controlled. The flexibility and simplicity of tags does not interfere with anything - you have still full control over all your content. Apply permissions to tags and/or namespaces to control who can create tags on your content or use your existing tags.
3. You can never have too many tags. Though if you have a lot, you can create namespaces to sort and organize your tags. With namespaces you can create categories of tags to make sure that tags that belong together are grouped together.
4. Tags are powerful organizers. With the ability to create tags and sub-tags it becomes possible to express entire taxonomic systems, covering terms, subterms and their relationships. This allows you to create a second (or third) content hierarchy in parallel to the official one.

Copyright 1993-2009 Day Management AG

5. Tags improve your search experience. You can search for tags and content that has tags. The default search component in CQ uses these mechanisms, so you can narrow the results down to those that are really relevant.

6. Tags can be simple and sophisticated at the same time. To create a tag all you need is a word and the touch of a button - it is that simple. Afterwards you can also add a title and description to the tag to add more semantics. There are no limits on the labels you select for your tags.

7. Tags are integral to Web Content Management, Digital Asset Management and Social Collaboration within CQ. The tagging system is a core component of CQ5 and is used by all CQ5 Applications to categorize content. Additionally, tagging is available to developers for their own tagging-enabled applications.

8. Tags can be created by anyone who needs a quick way to annotate a page. This helps with search-engine optimization, as tags will automatically show up in the metatags of the page, thus ensuring your page will be found by search engines.

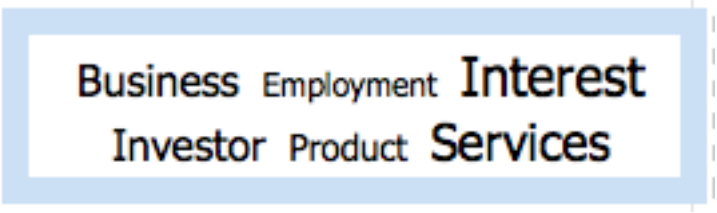
9. Tags have many names and faces: tags, taxonomy terms, categories, labels and many more. They are flexible in their content model and in the way they can be used; for instance, when outlining target demographics, categorizing and rating content or to create a secondary content hierarchy.

10. CQ5 is ideal for dealing with structured information, thanks to the nesting of pages and paths. It is also extremely powerful when dealing with unstructured information, due to the built-in full-text search. Tagging allows you to combine the strengths of both structure and flexibility.

When designing the content structure for your site, or the metadata schema for your Digital Asset Management, consider the options tagging gives you, as it often provides a more lightweight and accessible approach.

9.3 Tag Clouds

Tag clouds show a “cloud” of tags, either for the current page, the entire website, or those most commonly accessed:



Initially a side product of tags, tag clouds are now a popular mechanism of highlighting the issues that are (have been) of interest to the user.

9.4 How to Manage Tags in CQ WCM

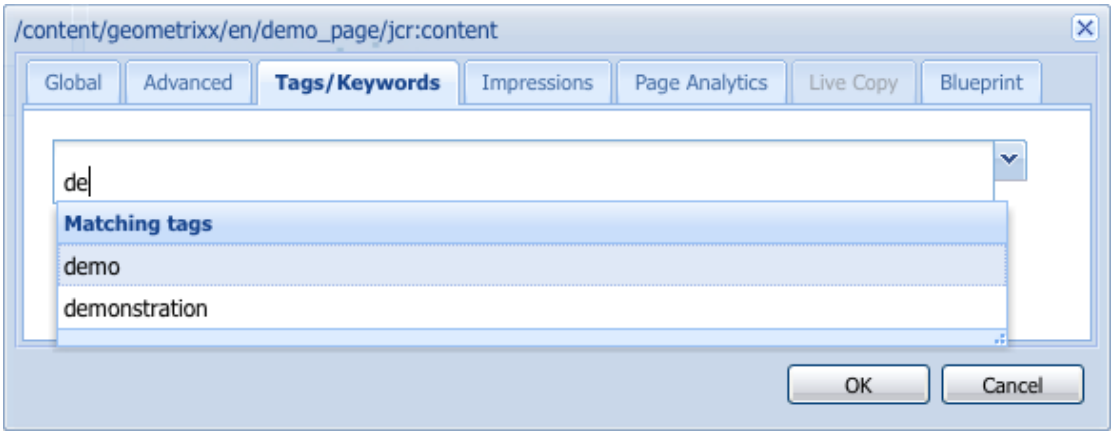
9.4.1 Using Sidekick to access and assign Tags

Many users will assign tags directly to the page they are editing. This can be done using the sidekick:

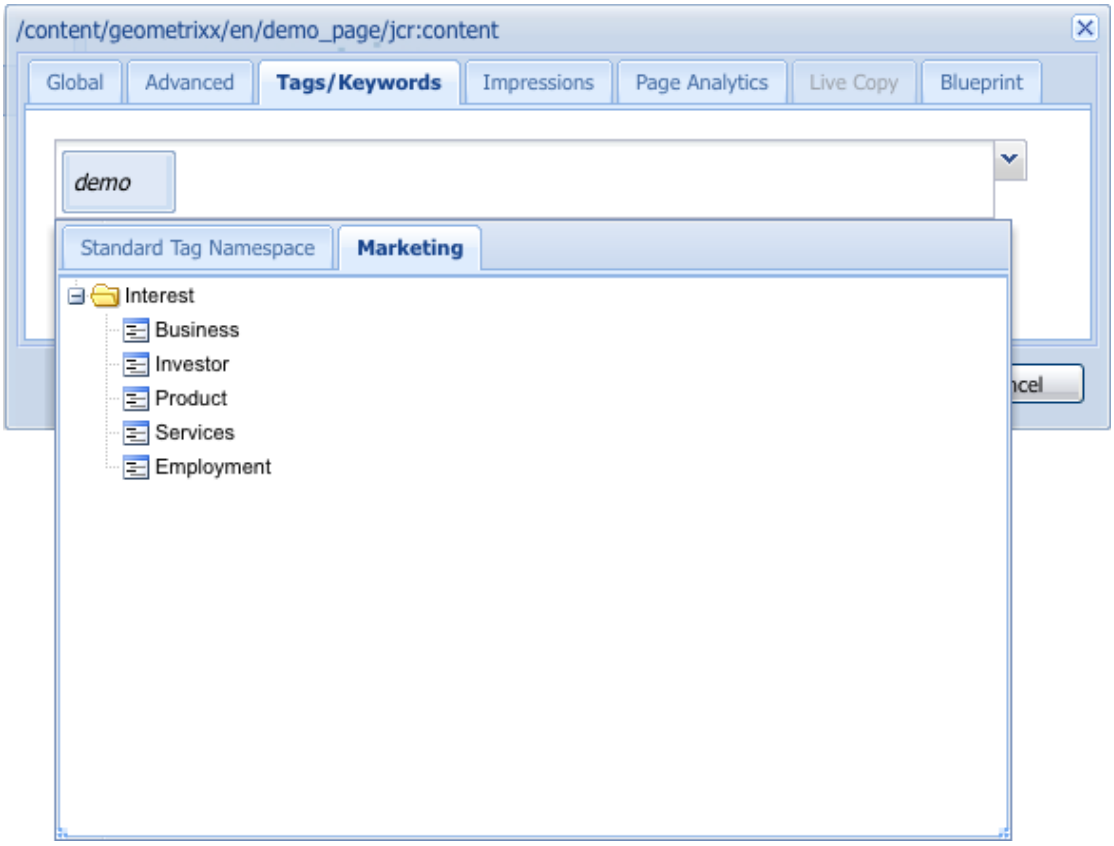
1. Within sidekick select the **`Page`** tab.
2. Click **`Page Properties...`**.
3. Select the **`Tags/Keywords`** tab.

   Here you can either enter a tag by typing a new name or by selecting an existing tag from the list of matching tags:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Or selecting a tag according to namespace by using the drop-down option:

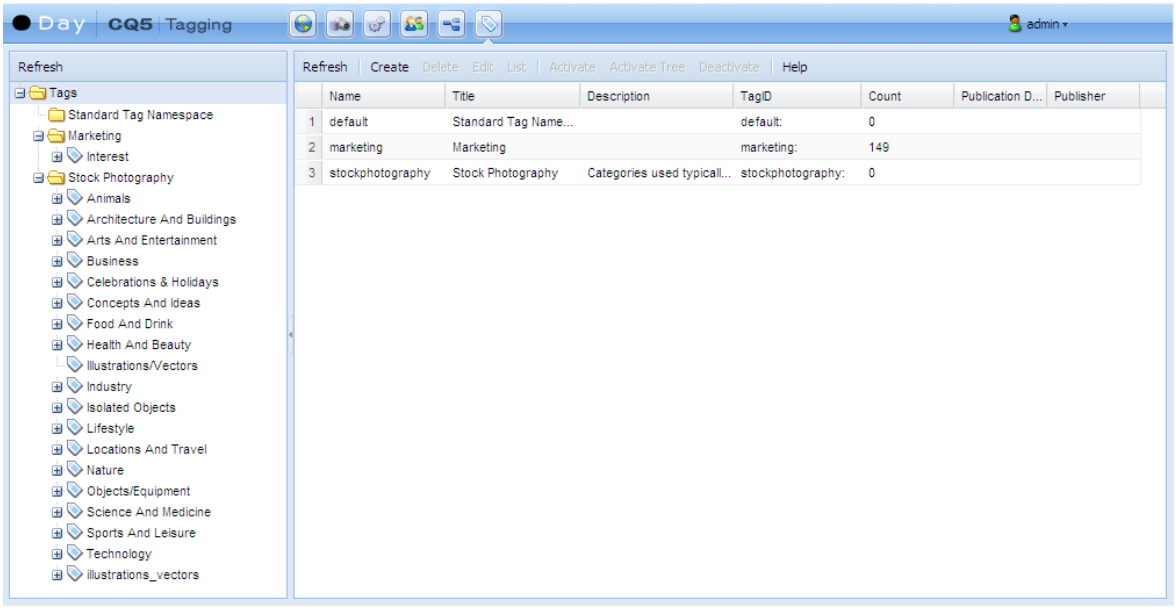


9.4.2 The Tag Administration Console

The Tag Administration console can be used to manage your tags and taxonomies.

It shows information about the tags already created for your website, and a count of how often they are referenced in the website:

Copyright 1993-2009 Day Management AG

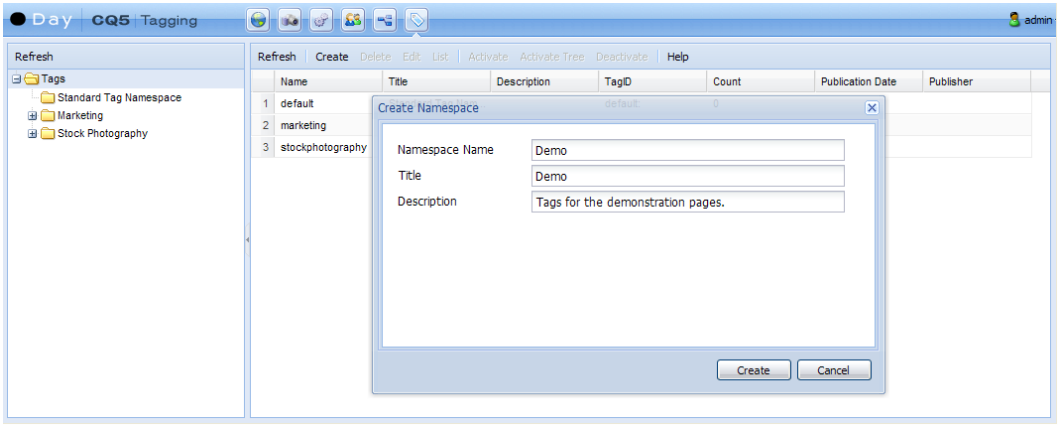


From here you can perform various actions on tags and/or namespaces.

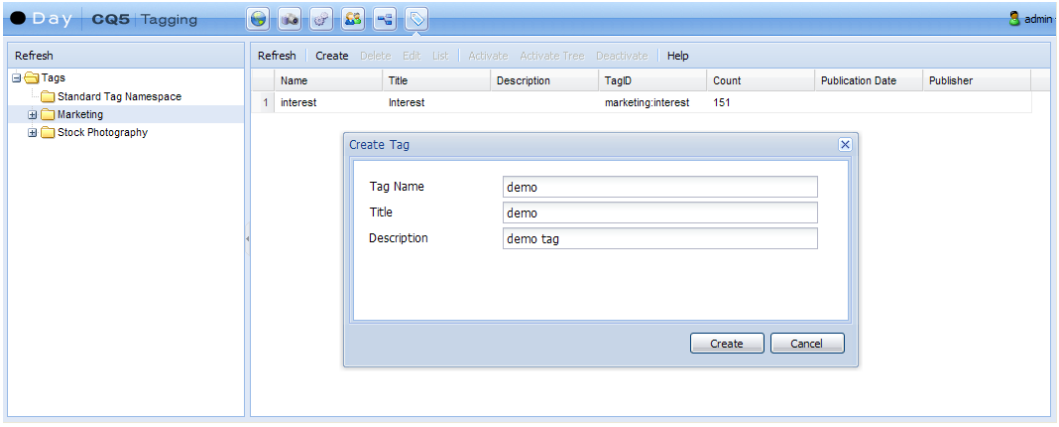
9.4.2.1 Creating or Editing Tags and Namespaces

1. Depending on the level you are starting from you can create either a tag or a namespace using **`Create`**:

   a. If you select **`Tags`** you can create a namespace:



   b. If you select a namespace (for example **`Demo`**) you can create a tag within that namespace:



Copyright 1993-2009 Day Management AG

2. In both cases enter a name, title, and description then click **Create**.

9.4.2.2 Deleting Tags

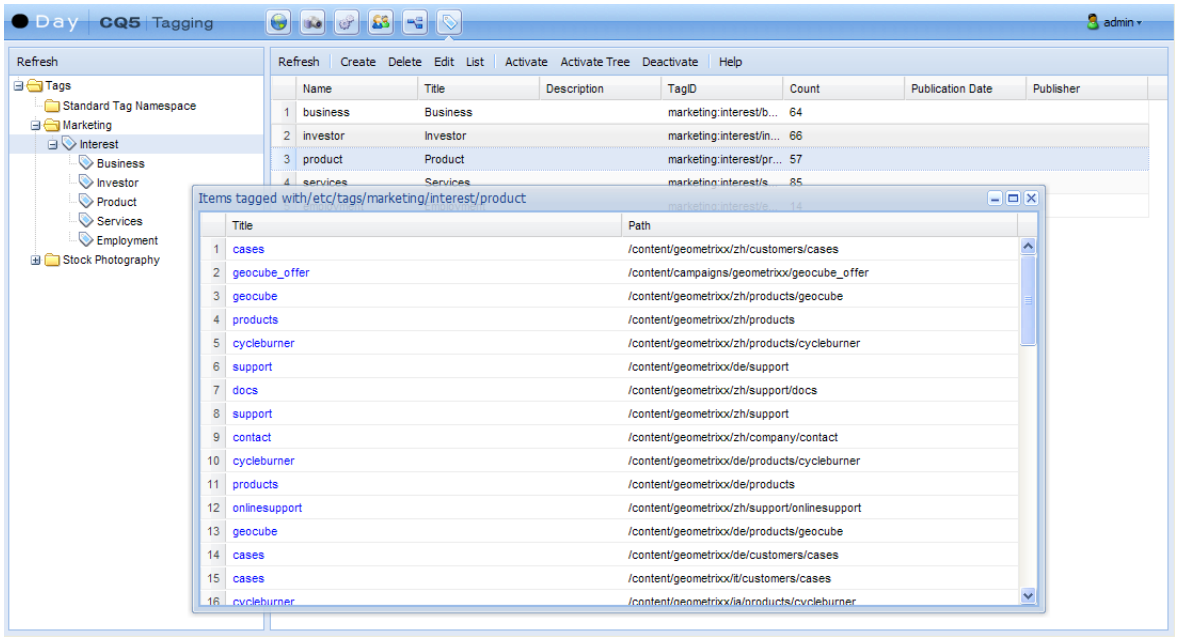
1. In the right-hand pane, select the namespace or tag that you want to delete.
2. Click **Delete**.
3. You are asked to confirm the delete action. Click **Yes** to delete the item.

9.4.2.3 Activating and Deactivating Tags

1. In the right-hand pane, select the namespace or tag that you want to activate or deactivate.
2. Click **Activate**, **Activate Tree,** or **Deactivate** as required.

9.4.2.4 List - showing where tags are referenced

List opens a new window showing the paths of all pages using the highlighted tag:



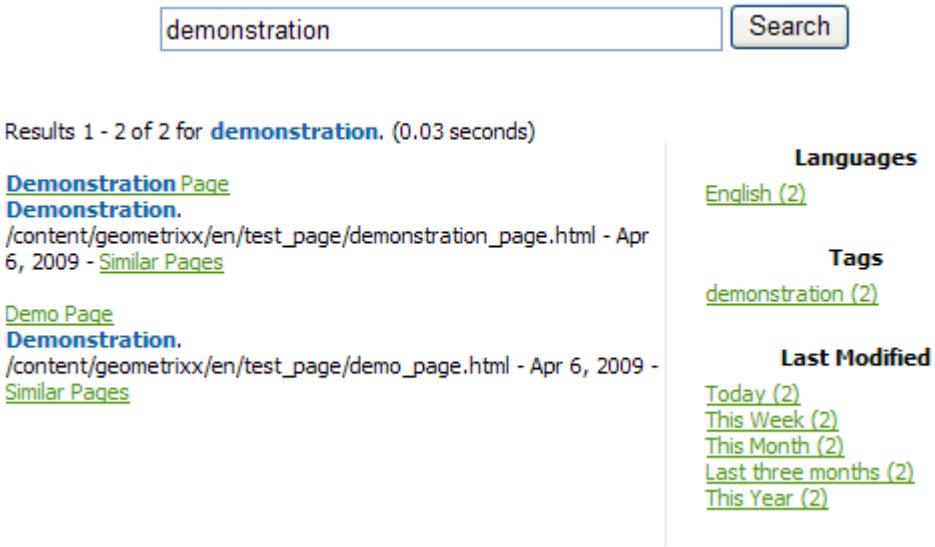
9.4.3 Searching for Tags

You can search for tags in both the author and publish environments.

9.4.3.1 Searching for tags with the Search component

The search component covers tags and can be used in both the author and publish environments.

Copyright 1993-2009 Day Management AG



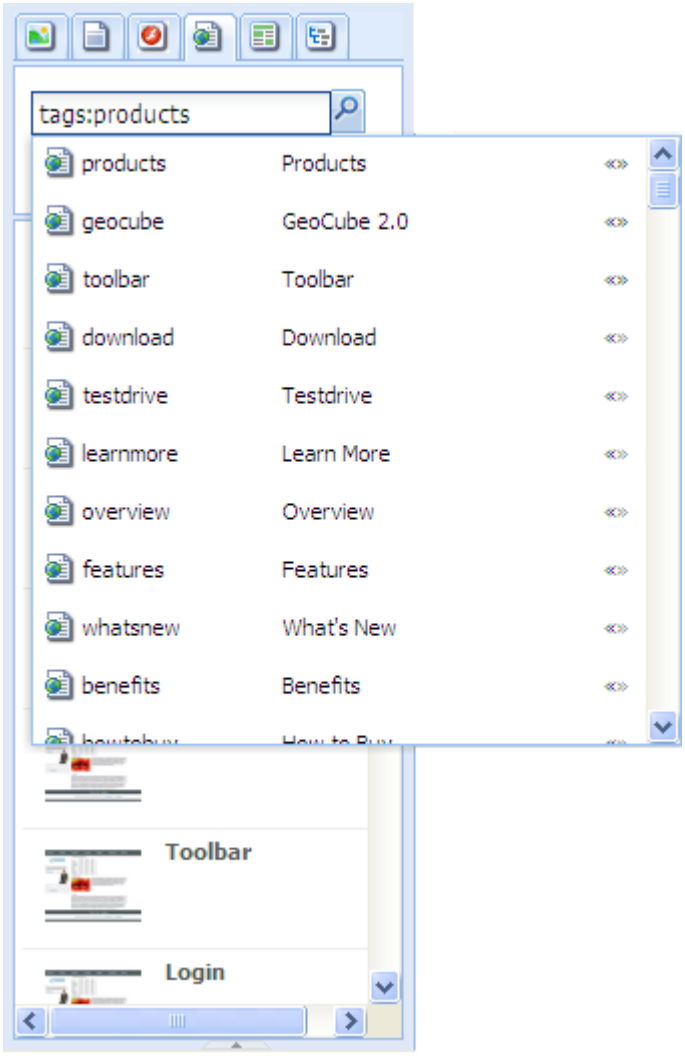
9.4.3.2 Searching for tags with the Content Finder

In the author environment you can use the content finder to search for tags:

1. Select the **Pages** tab in the content finder.
2. Enter the tag you want to search for.

   Using the prefix "**tags:**" limits the search to tags only.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



Copyright 1993-2009 Day Management AG

10 Personalization

10.1 What is Personalization?

There is an ever-increasing volume of content available today, be it on internet, extranet, or intranet websites.

Personalization centers on providing the user with a tailor-made environment displaying dynamic content that is selected according to their specific needs; be this on the basis of predefined profiles, user selection, or interactive user behavior.

There are three main elements involved in personalization:

Users

- have profiles, both individual and group. These profiles contain characteristics (such as job description, location, interests) which can be used to personalize the content they can see.
- take actions. These can then be analyzed and matched against behavior rules to tailor the content they see.

Content

- is what the user wants to see. Preferably content of interest and use to them for fulfilling their tasks.
- can be categorized, and therefore made available to users according to predefined rules.
- must be dynamic; in other words the content must, in some way, be dependent upon the user – if every user would see the same content, then personalization would be redundant.

Rules

- define how personalization actually happens – which content the user can see, and when.

Personalization can be either:

Explicit

- Customization: whereby the user makes selections from a choice of content sources.

Implicit

- Rules based: business managers define specific rules for actions based upon specific profiles and/or behavior.
- Simple filtering: selections are made on the basis of predefined profiles at user and/or group level.
- Collaborative / recommendation filtering: user behavior is registered according to predefined rules. These rules are based on behavior observed with “like-minded” individuals. The information collected is used to tailor the information displayed to the user, particularly in the form of recommendations.

10.2 How and when can Personalization be used?

Personalization can be used in many cases, for example:

Intranet pages
: Content can be proffered based on the location, department, and/or role of a user – already defined within an internal network.

Copyright 1993-2009 Day Management AG

Dependent on the choice available, the user can make further selections.

Specific, limited, target user groups (extranets)
: Users require a login for authorization; this will be linked to a profile providing information required for personalization; possibly details such as their location, “relationship” to the product, usage history, budgeting responsibilities, etc.

  Such instances can range over sites such as:

  - Companies which provide websites to a highly specialized section of their market e.g. a pharmaceutical company providing a specialized website for physicians.
  - Companies which provide websites allowing their customer to view current account and billing information; for example telephone providers.

Sales and Distribution website
: Sales and distribution websites, such as Amazon, can combine a user profile, the user's sales history and their browsing history to make suggestions as to what might interest the user next.

Search websites
: Many of the major search engine websites have very powerful analytical tools which record user behavior, the search terms they use and the websites they actually visit. This is then used to customize the content provided – particularly with regard to displaying advertisements.

10.3 Strengths of Personalization

- A user can experience a comfortable, focused website.
- Personalization can be used to automatically propagate access to the latest version of content.
- Social collaboration features are available for users to communicate with each other, as they can be identified by their profiles.
- A user can be provided with the content they need to fulfill a particular task. Within a company's intranet this can provide an invaluable tool for disseminating information.
- A user can be provided with the content they need/want, thus reducing the time they need to perform search operations.
- The content provider can steer the content to be seen by specific categories of users.
- Rules can be defined to deliver content based on combinations of both user characteristics and behavior. This provides a sophisticated mechanism for personalizing their web-experience.

10.4 Points to consider

Performance
: Naturally the extra analysis and evaluation has an impact on performance. However, the methods used are highly sophisticated and can be optimized to minimize the impact.

Authorization
: Personalization requires a login mechanism as the website must be able to identify the user.

Caching
: Caching is an aspect which the user will see in terms of performance and accuracy – how quickly does the website deliver personalized content, and is it always current.

  Caching is a key consideration when configuring personalization and time must be taken to ensure that the correct implementation is used. This will be discussed in more detail later.

Accuracy of Rules
: Personalization realized by tracking the user's behavior, or setting rules based on the user's profile, must be accurate and logical.

Copyright 1993-2009 Day Management AG

There is nothing more frustrating to the user than having content “forced upon”, or “denied to”, them because of the inaccurate logic of a rule.

Therefore rules must be well thought-out – with the user's requirements in the foreground. This can take a lot of effort, and is not to be under-estimated; defining the business rules often outweighs the technical effort when implementing personalization.

When to use

Like many features on the web, personalization should be used with care. “Will its use really benefit the user?” should always be the first consideration - or whether the desired goal can be achieved with less effort by another method. Personalization can run the risk of being a feature that users configure once (to see how it works) and only once – as it brings them no real advantages.

Personalization is only meaningful when the content is dynamic – dependent on the user in some way. If all users see the same content, then the personalization is redundant.

Confidentiality

Many users are concerned about Data Protection and Security. In particular concerning data retrieved when tracking their behavior when surfing the web.

10.5 Personalization and Access

Personalization should be considered separately from access control, but they do interrelate.

Personalization itself does not create any form of access control. It is simply a method of steering what the user sees; it does not restrict the user from accessing other content and as with any content, they need to have the correct access controls already assigned.

However, access control can be used to create a form of personalization. If you allow or deny a user access to content, this inevitably affects the choice of content that they have available - thus personalizing their web-experience.

10.6 Components available for Personalization

Various components are provided with CQ WCM to realize personalization. Some allow users to log in and edit their profiles, others (like My Gadgets) allow the users to configure a specific page:

Table 10.1. Personalization Components within CQ5

Title in Sidekick	Purpose
Checked Password Field	Requests password and confirmation of password.
Combined Sign-in Sign-up	Allows the user to either sign in to an existing account, or to sign up for a new account.
Forms Address Field	A complex field allowing the input of an international address.
Forms Begin	Starts a form definition
Forms Captcha	A field consisting of an alphanumeric word that refreshes automatically. The captcha component protects websites against bots.
Forms Checkbox Group	Multiple items organized into a list and preceded by check boxes. Users can select multiple check boxes.
Forms Dropdown List	Multiple items organized into a drop-down list. The **`Multi Selectable`** switch specifies if several elements can be selected from the list.
Forms End	Terminates the form definition.

Copyright 1993-2009 Day Management AG

Title in Sidekick	Purpose
Forms File Upload	An upload element that allows the user to upload a file to the server.
Forms Hidden Field	This field is not displayed to the user. It can be used to transport a value to the client and back to the server. This field should have no constraints.
Forms Image Button	An additional submit button for the form that is rendered as an image.
Forms Password Field	Same as text field but only a single line is allowed and the text input from the user is not visible in the field.
Forms Radio Group	Multiple items organized into a list preceded by a radio button. Users must select only one radio button.
Forms Submit Button	An additional submit button for the form where the title is displayed as text on the button.
Forms Text Field	Text field that allows users to enter information.
My Gadgets	Allows you to include one of a selection of gadgets available.
Profile Avatar Photo	Allows input of an Avatar Photo.
Profile Detailed Name	Input of name details, including elements such as title, middle name and suffix if required.
Profile Display Name	Name to be displayed.
Profile E-mail	Input of an e-mail address.
Profile Gender	Allows input of the gender.
Profile Primary Phonenumber	Allows input of a telephone number.
Profile Primary URL	Allows input of a URL.
Profile General Text property	Profile properties.
Sign-in	Allows you to submit a username and password when logging in.
Sign out	Indicates the user currently logged in, and gives you a link to log out.
Tag Cloud	A tag cloud to show a graphically presented selection of tags within your website
Teaser	A piece of content (usually an image) displayed on a main page to "tease" users into accessing the underlying content.

10.7 Personalization and Social Collaboration

As with any form of user generated content (blog, wiki, calendar, amongst others), issues arise when multiple publish environments are used.

How to synchronize multiple publish environments so that all hold the same information as input by the user on one specific environment? For example, the selections made by users. There are various methods of dealing with this:

- synchronize the multiple publish environments when necessary
- return the user generated content from the publish to the author environment; from here propagate the user generated content to all publish environments as normal. See the section called “Replicating from Publish to Author” for further information.

The method selected should be carefully considered before and during implementation.

See Chapter 11, for further information.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

11 Social Collaboration in CQ WCM

Social Collaboration provides a unification of all social networking and collaboration applications within CQ5:

- Blogs
- Calendars

Also providing social identity management, moderation and reverse replication for all of the above.

11.1 Blogs

A blog (or weblog to use the full name) is a web site that provides commentary or information on a particular subject or company, while also letting readers:

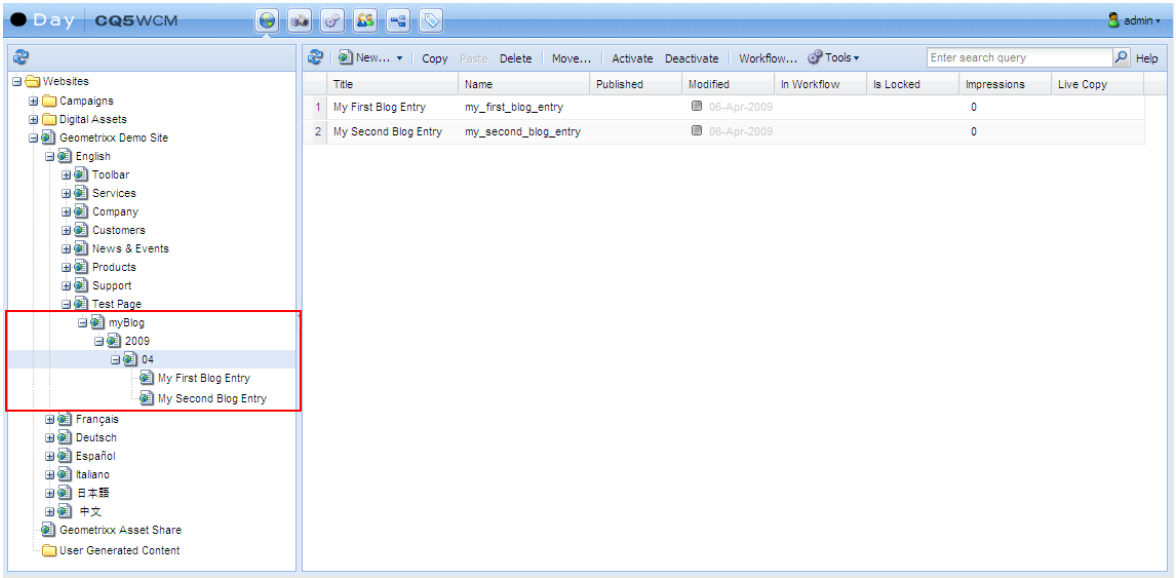
- leave comments about the individual entries
- subscribe to feeds
- set trackbacks

and thereby interact with each other.

The CQ5 blog template provides a quick and easy mechanism for setting up a complete blog, including:

- individual entries; written in chronological order, but listed in reverse chronological order
- search
- quick reference links sorted by date and/or tags

Blogs have a predetermined structure in CQ WCM. The root (or overview) page is at the head of the structure, which sorts the blog entries by date:



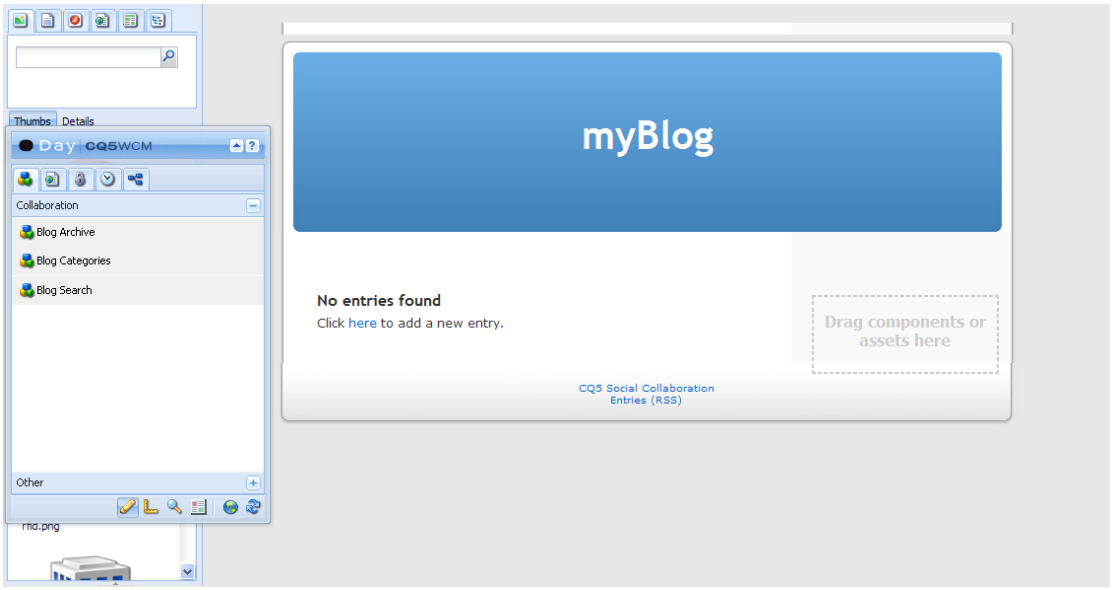
11.1.1 How to Blog with CQ

11.1.1.1 Creating a new blog

To create a new blog:

Copyright 1993-2009 Day Management AG

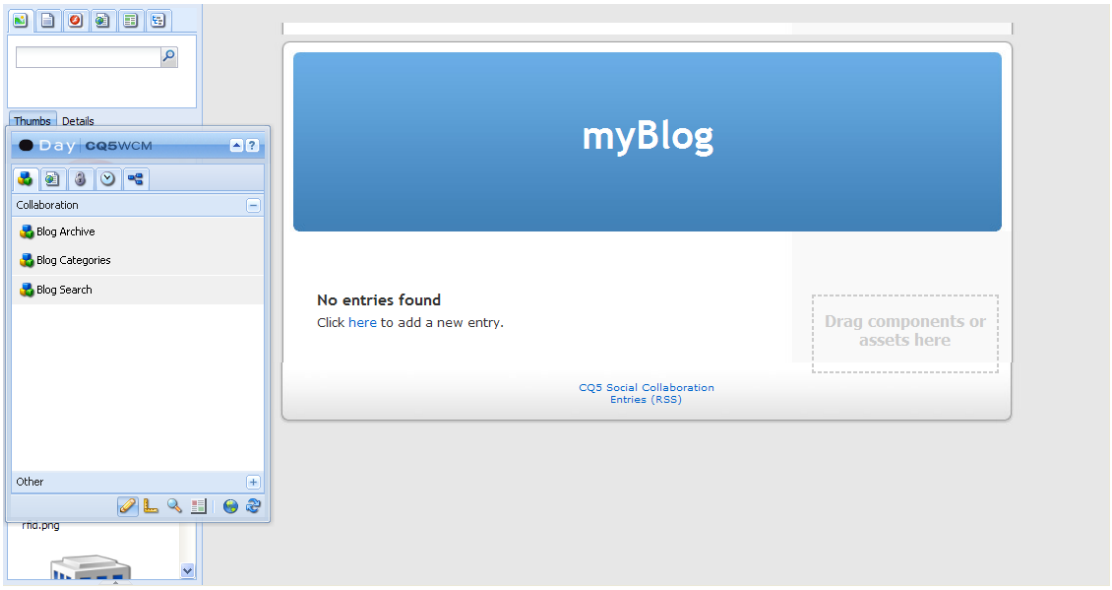
1. Open the CQ WCM siteadmin.
2. Select the location where you want to create your blog.
3. Select the **`New...`** menu (click the arrow next to **`New...`**).
4. Select **`New Page...`**.
5. Enter a **`Title`** for your new page and the **`Name`** if you do not want the default.
6. Select the **`Blog Template`**.
7. Click **`Create`** to create the new blog page. A new page looks as follows:



11.1.1.2 Posting a new blog entry

To post a new entry to your blog:

1. Open your blog page:



2. Click the link **`here`** to open the dialog:

Copyright 1993-2009 Day Management AG

Here you can enter a heading and body text. Assigning a category (tag) to this entry lists this entry under the appropriate category.

3. Click **`Submit Entry`** to save the blog entry. It appears as follows:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

myBlog
My First Blog Entry
By admin
My first blog entry. Keep watching...
This entry was posted on Mon Apr 06 11:58:37 CEST 2009 and filed under demo. You can follow any responses to this entry through the RSS feed. You can leave a response, or trackback from your own site. Edit this entry.
Comment
Type your comment here.
Name
Email
Website (optional)
Post Comment
No comments yet
CQ5 Social Collaboration Entries (RSS)

11.1.1.3 Adding quick reference links to your blog

To add quick reference links to your blog overview page:

1. Open the blog overview page.
2. From the sidekick you can add various quick reference components to the right column:

   Blog Archive
   : Allows quick reference to blog entries according to their dates of entry.

   Blog Categories
   : Allows quick reference to blog entries according to their categories (tags).

   Blog Search
   : A search box that allows the user to search all blog entries.

Copyright 1993-2009 Day Management AG

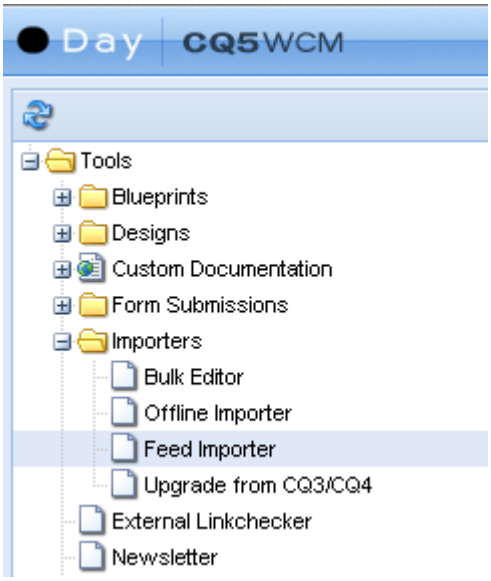
Tag Cloud
Displays tags; either from the entire website or the current page.

11.1.1.4 Importing RSS Feeds

You can import RSS feeds into your blog in CQ WCM by using the polling importer.

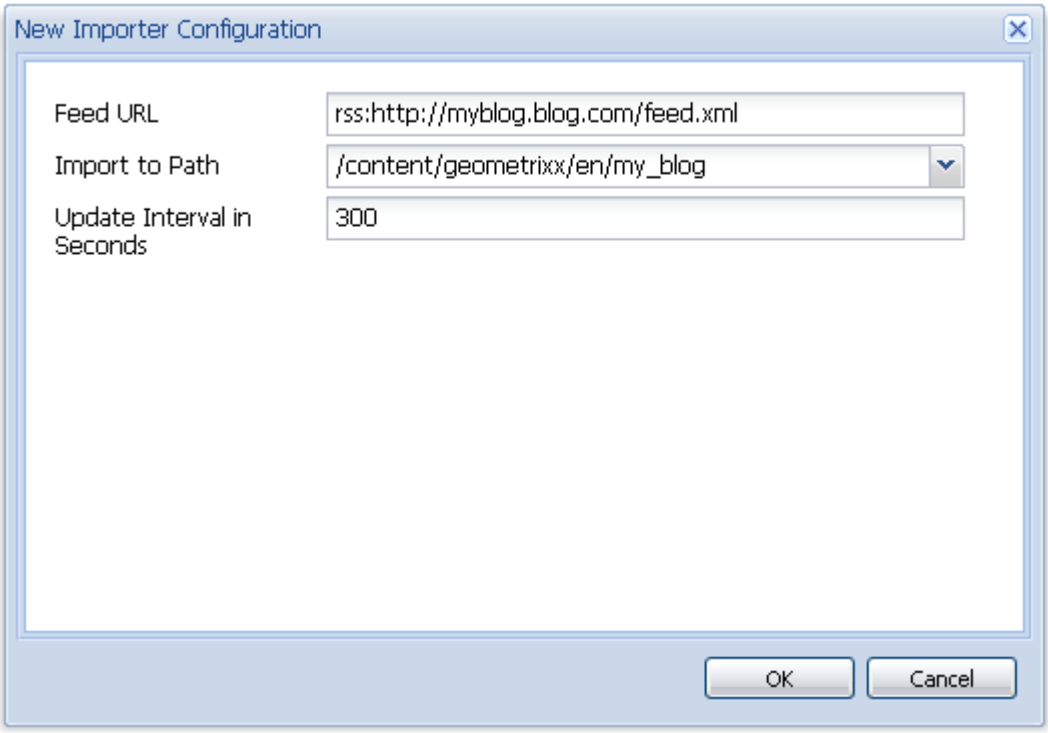
To import blogs from other websites into your blog:

1. Navigate to the **Tools** window.
2. In the **Tools** window, expand the **Importers** folder and double-click the **Feed Importer**.



3. Click **Add** to open the **New Importer Configuration** window.

Copyright 1993-2009 Day Management AG



4. In the **`Feed URL`**, enter the source url for the blog data. The format is `rss:<URL_OF_BLOG>`, for example, `rss:http://blog.nameofblog.com/feed.xml`.

5. In the **`Import to Path`** field, add the path where the imported blog should be stored, such as `/content/blogs/myblogs`.

6. In the **`Update Interval in Seconds`** field, enter a time in seconds. The minimum is 300 seconds. The first import of blog information happens after the time you specify (you do not see content import until after the specified time).

   Note

   The minimum can be reconfigured in the OSGi interface to less than 300 seconds, but reconfiguring the minimum is only recommended for testing purposes.

7. Click **`OK`**. Your import configuration is stored.

8. Navigate to your blog. After the specified interval, imported data appears on the blog.

11.2 Calendars

The Calendar template has the following functionality:

- You can create one or more calendars where you add and modify events. The calendar can be embedded.
- Calendars have month and agenda views.
- You can filter events.
- You can subscribe to an ICS from the web, for example google calendar, and import those events into your CQ calendar.

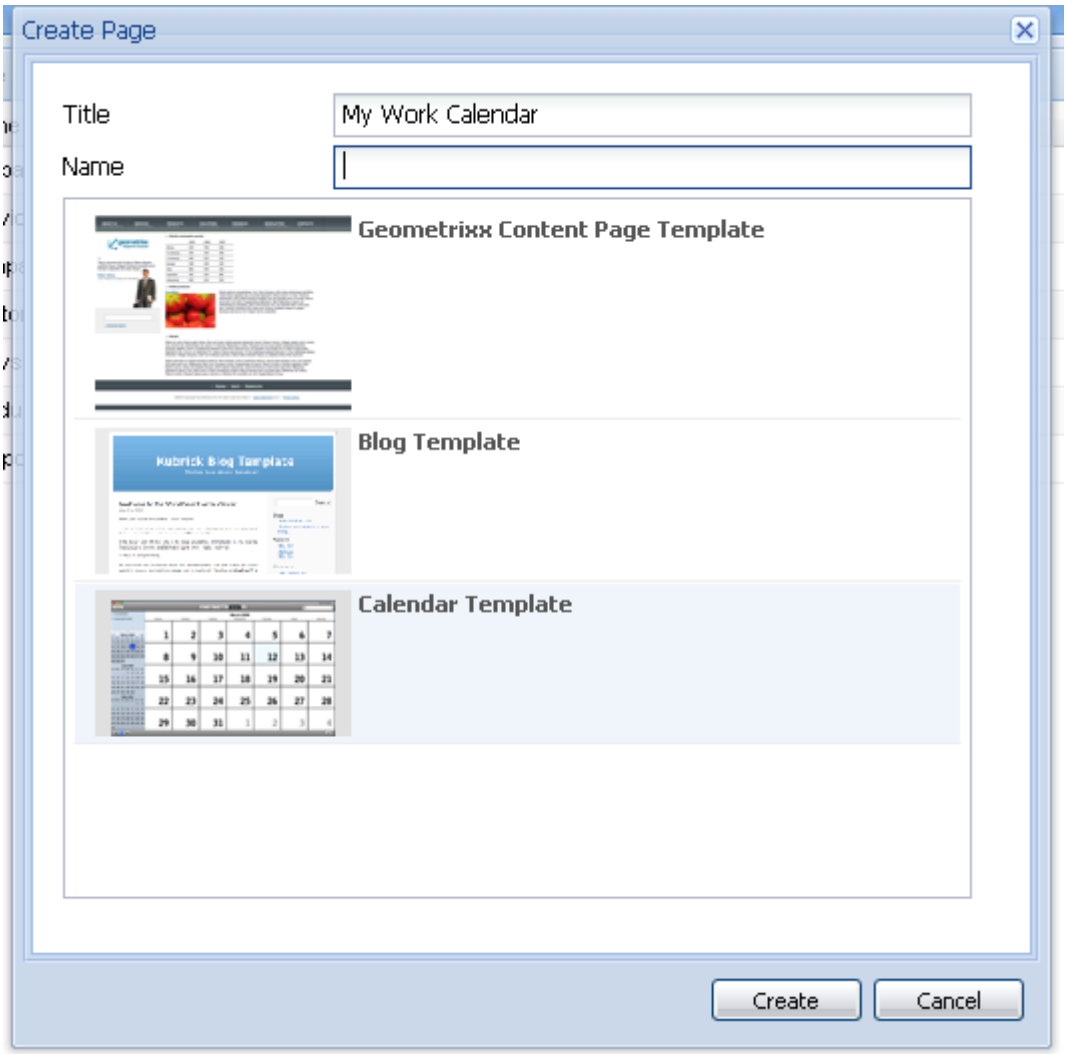
Copyright 1993-2009 Day Management AG

11.2.1 How to Use the Calendar with CQ WCM

11.2.1.1 Creating a new calendar

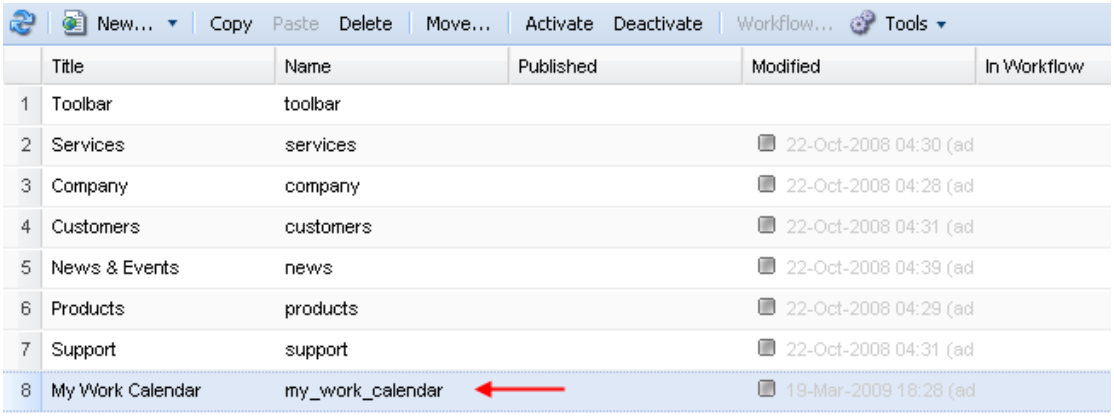
To create a new calendar:

1. Open the CQ WCM siteadmin.
2. Navigate to the folder or website where you want to add the calendar template.
3. Select the **New** menu.
4. Select **New Page**.



5. In the Create Page window, enter a **Title** for your new page and the **Name** if you do not want the default.
6. Select the **Calendar** Template.
7. Select **Create** to create the new calendar page. The new calendar page is listed in the siteadmin window.

Copyright 1993-2009 Day Management AG

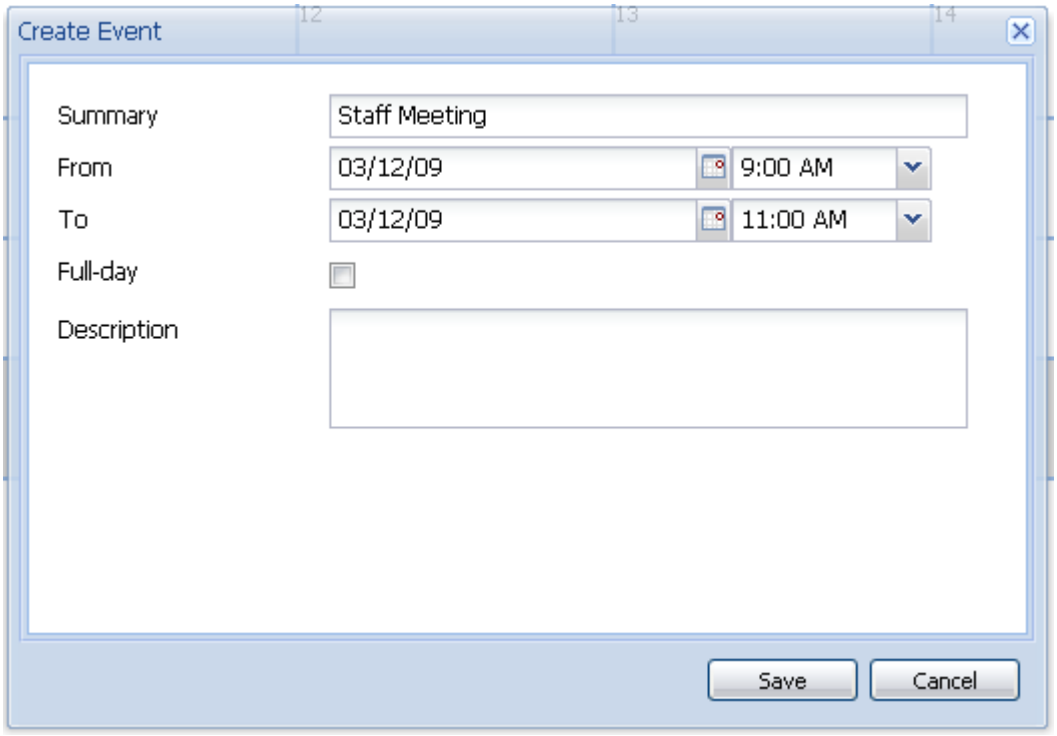


11.2.1.2 Creating Events

You can create events that last hours or indicate that an event is all day.

To create an event:

1. In **Month** or **Agenda** view, double-click the date that you want to enter an entry for. The **Create Event** window opens.



2. In the **Summary** field, enter a descriptive name for the event. In the **From** and **To** fields, enter the appropriate start and end times. If the event is an all-day event, select the **Full-day** check box instead of entering times. Optionally, add a description.

3. Click **Save**. The event appears on your calendar.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

Wednesday	Thursday	Friday
4	5	6
11	12 09:00 Staff Meeting	13

11.2.1.3 Importing Events from another Calendar

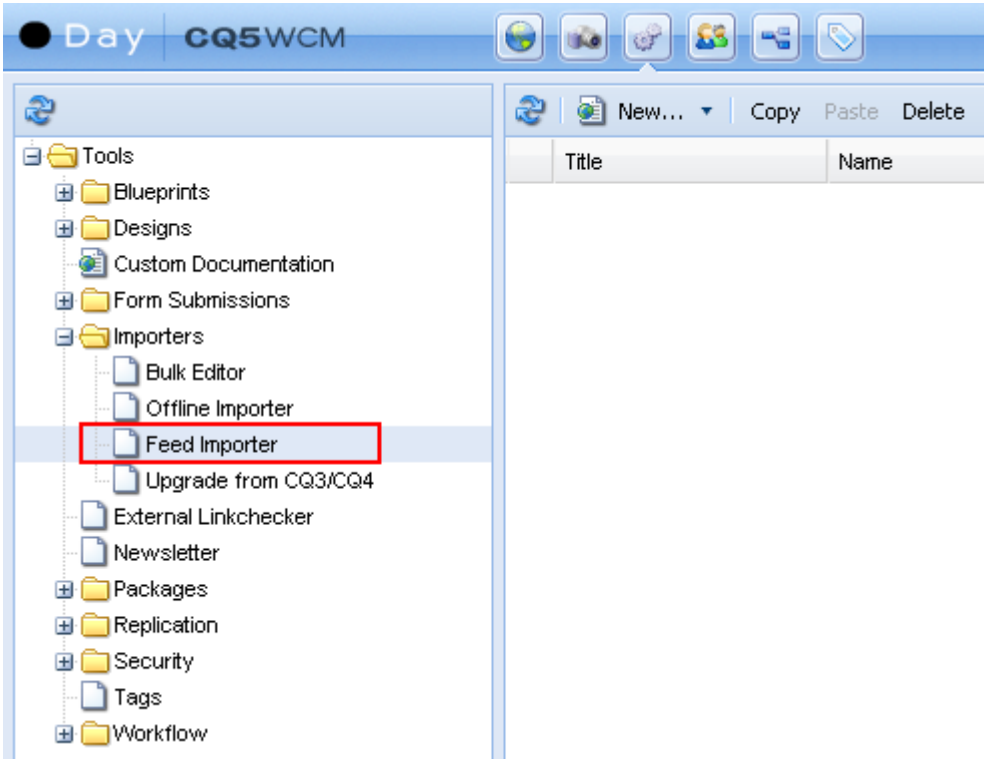
You can import events from another web-based calendar into your CQ WCM calendars using the polling importer. You can import either a public calendar or a private calendar. If you import a private calendar, you need the private ics URL. Calendar URLs are generally available within a calendar's settings. Check the documentation for your calendar application for more information.

Note

You need to enter at least one event into the calendar before you can import events from other calendars. If all of your events come from other calendars, work around this issue by creating a dummy event, importing your events from the other calendar, and then deleting the dummy event.

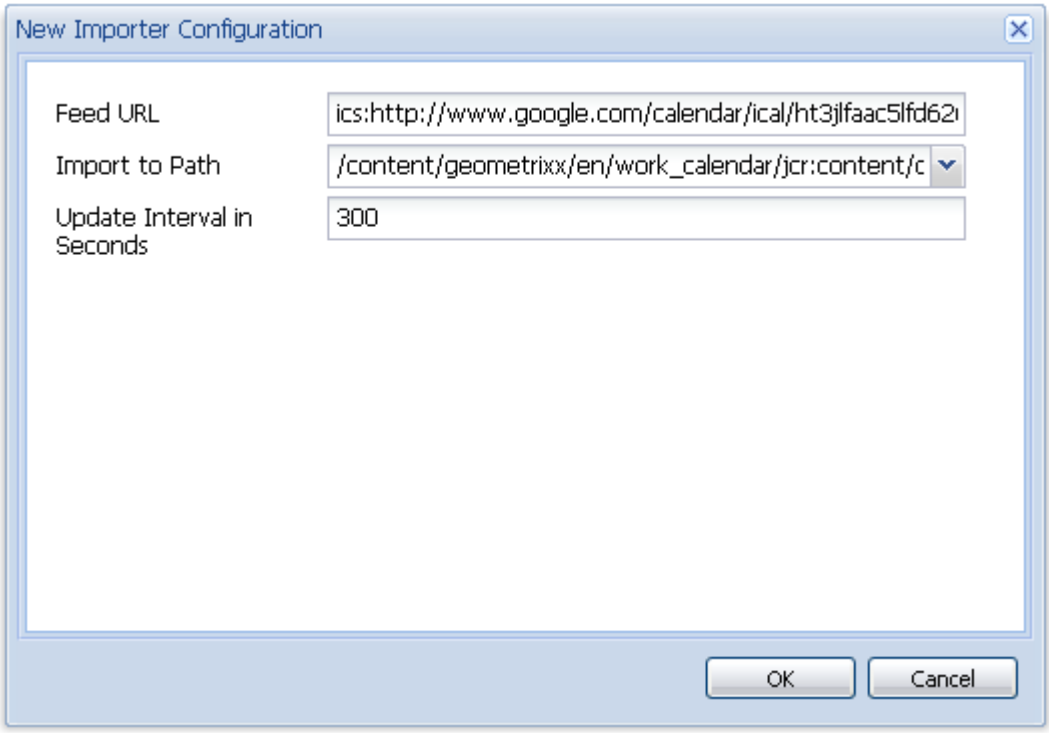
To import events from another calendar:

1. Navigate to the **Tools** window.
2. In the **Tools** window, expand the **Importers** folder and double-click the **Feed Importer**.



3. Click **Add** to open the **New Importer Configuration** window.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



4. In the **`Feed URL`**, enter the source url for the calendar data. The format is `ics:<URL_OF_ICS_FILE>`, for example, `ics:http://server.com/path/to/calendar.ics`.

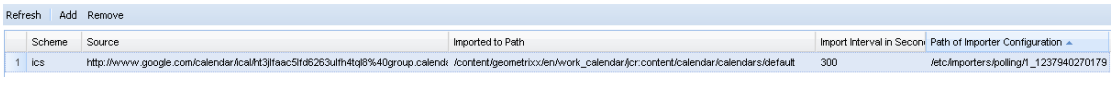
5. In the **`Import to Path`** field navigate to the calendar you created and then navigate to `/jcr:content/calendar/calendars/default`. (You can also paste the path into the field.) For example, for a page created in `/content/calendar.html` the import path is `/content/calendar/jcr:content/calendar/calendars/default`.

6. In the **`Update Interval in Seconds`** field, enter a time in seconds. The minimum is 300 seconds. The first import of calendar information happens after the time you specify (you do not see content import until after the specified time).

   Note

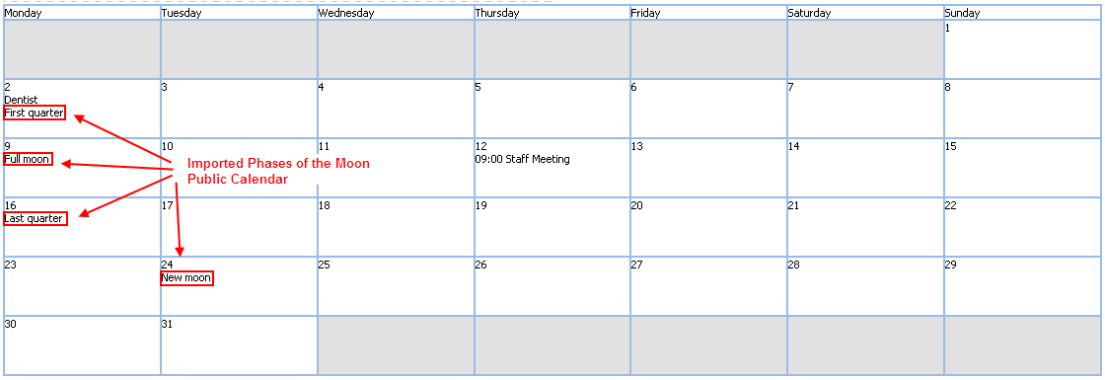
   The minimum can be reconfigured in the OSGi interface to less than 300 seconds, but reconfiguring the minimum is only recommended for testing purposes.

7. Click **`OK`**. Your import configuration is stored.



8. Navigate to your calendar. After the specified interval, imported data appears on the calendar.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

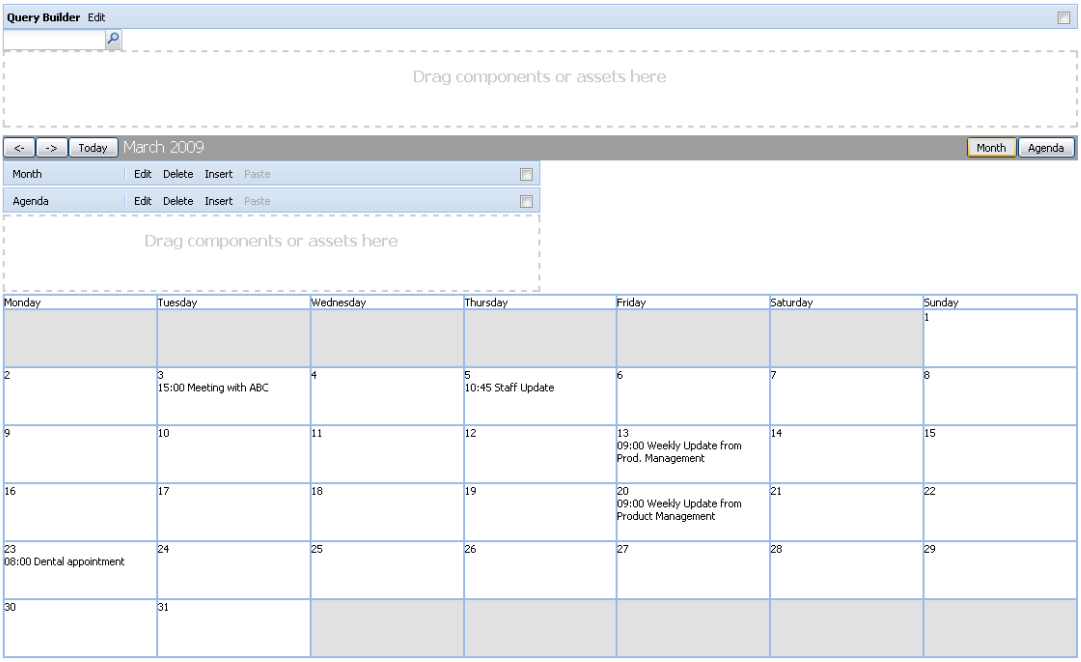


11.2.1.4 Customizing a Calendar

Anytime after you have created a calendar, you can customize it.

To customize a calendar:

1. Navigate to the calendar and double-click to open it.



2. By default, the calendar template includes a query builder for fulltext searching and lens views, which are different ways to view the calendar information. To edit those, click **`Edit`** for the appropriate component.

11.2.1.5 Switching Between Agenda and Month Views

In the calendar template, you can switch between the agenda and month views (provided you have included them in your template).

To switch views in the calendar template, click the appropriate button.

For example, clicking **Agenda** displays the agenda view and clicking **`Month`** displays the month view. An example of a month view:

Copyright 1993-2009 Day Management AG

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
						1
2	3 15:00 Meeting with ABC	4	5 10:45 Staff Update	6	7	8
9	10	11	12	13 09:00 Weekly Update from Prod. Management	14	15
16	17	18	19	20 09:00 Weekly Update from Product Management	21	22
23 08:00 Dental appointment	24	25	26	27	28	29
30	31					

11.2.1.6 Navigating Dates

To navigate months, click the left and right arrows above the calendar. To move to today, click the **Today** button.

11.2.1.7 Modifying and Deleting Events

To modify or delete any event:

1. In the calendar, double-click the event you want to modify or delete. The **Edit Event** window opens.

2. If you are editing the event, make your changes and click **Save**. If you are deleting an event, click **Delete**.

11.2.1.8 Filtering Events

You can filter events within the current month. For example, to see only those items that have the word "staff" in them, you can use a filter.

To filter events:

1. In the Query builder, type the term you want to filter against. (This is the keyword that CQ WCM looks for in the calendar).

2. Click the magnifiying glass to apply the filter. All other calendar events are hidden.

Copyright 1993-2009 Day Management AG

Tuesday	Wednesday	Thursday	Friday
3	4	5 10:45 Staff Update	6
10	11	12	13
17	18	19	20

3. Remove the keyword in the **`Query Builder`** and click the magnifying glass to remove the filter. All events are displayed.

Tuesday	Wednesday	Thursday	Friday
3 15:00 Meeting with ABC	4	5 10:45 Staff Update	6
10	11	12	13 09:00 Weekly Update from Prod. Management
17	18	19	20 09:00 Weekly Update from Product Management

11.3 Social Identity Management

Social collaboration profiles are used to achieve the personalization needed for the users to interact with your website and each other. This means that users can be identified when communicating with other users and also can configure their own experience of your website.

11.3.1 Managing the Social Collaboration Profiles

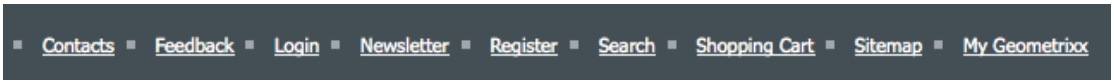
To use the social collaboration features, users need to register for an account, then log in so that they:

- have an identity to be used for communication with other website users
- can configure specific pages to their own requirements

11.3.1.1 Registering and editing a user profile

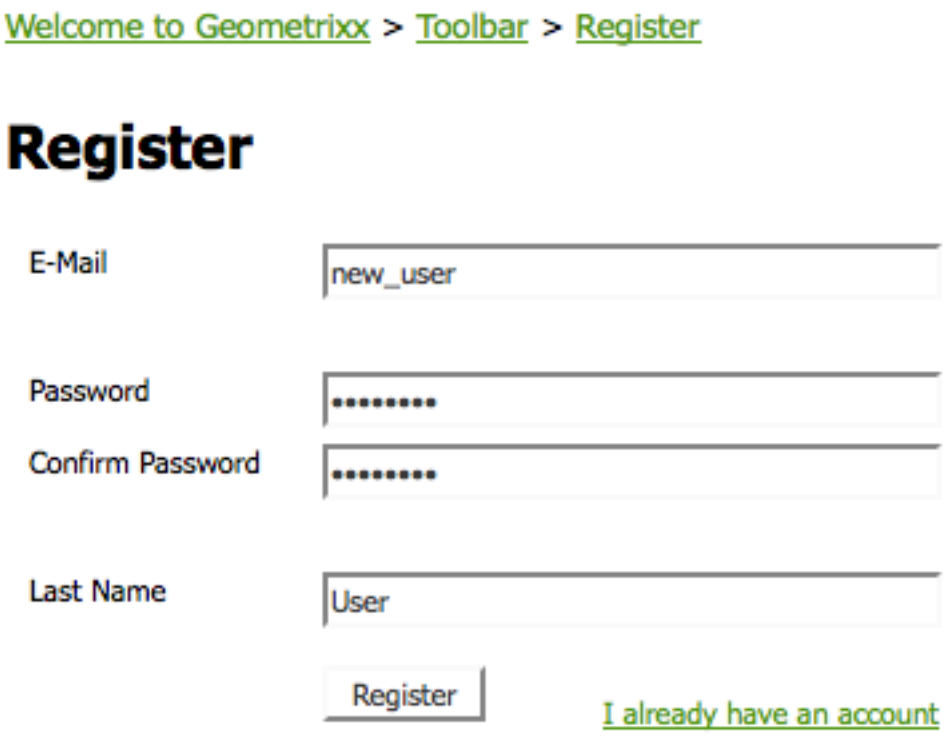
When users want to use the social collaboration functionality with CQ, they must register:

1. Users log in using the **`Login`** option on the toolbar:



Copyright 1993-2009 Day Management AG

2. This provides them with the following fields for registering the basic details required:



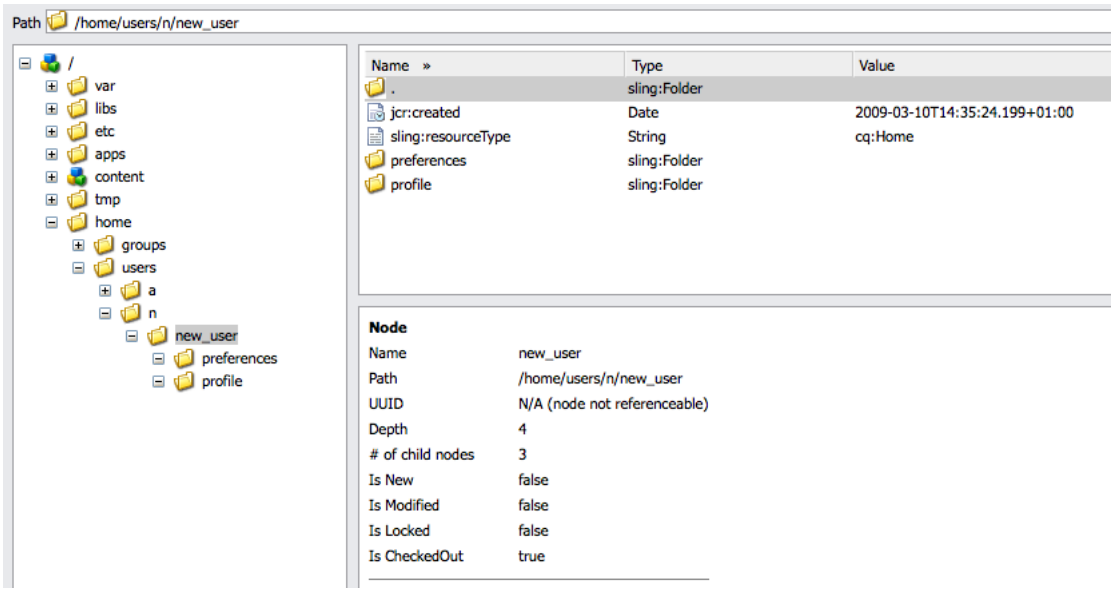
3. Once registered, users can edit their profiles:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

11.3.1.2 Finding the profiles in CRX

When a visitor registers for a new social collaboration profile, it is saved in CRX:

- The profile can be found in CRX under `/home/users`:



Copyright 1993-2009 Day Management AG

11.4 Moderating Social Collaboration sites

Moderation involves setting up a workflow with launcher task to fetch comments and/or blog posts so that a person can be assigned to:

- monitor comments
- adjudicate on the quality of comments; for example remove obscene entries
- provide further feedback if necessary

Copyright 1993-2009 Day Management AG

12 Extending CQ documentation and Online Help

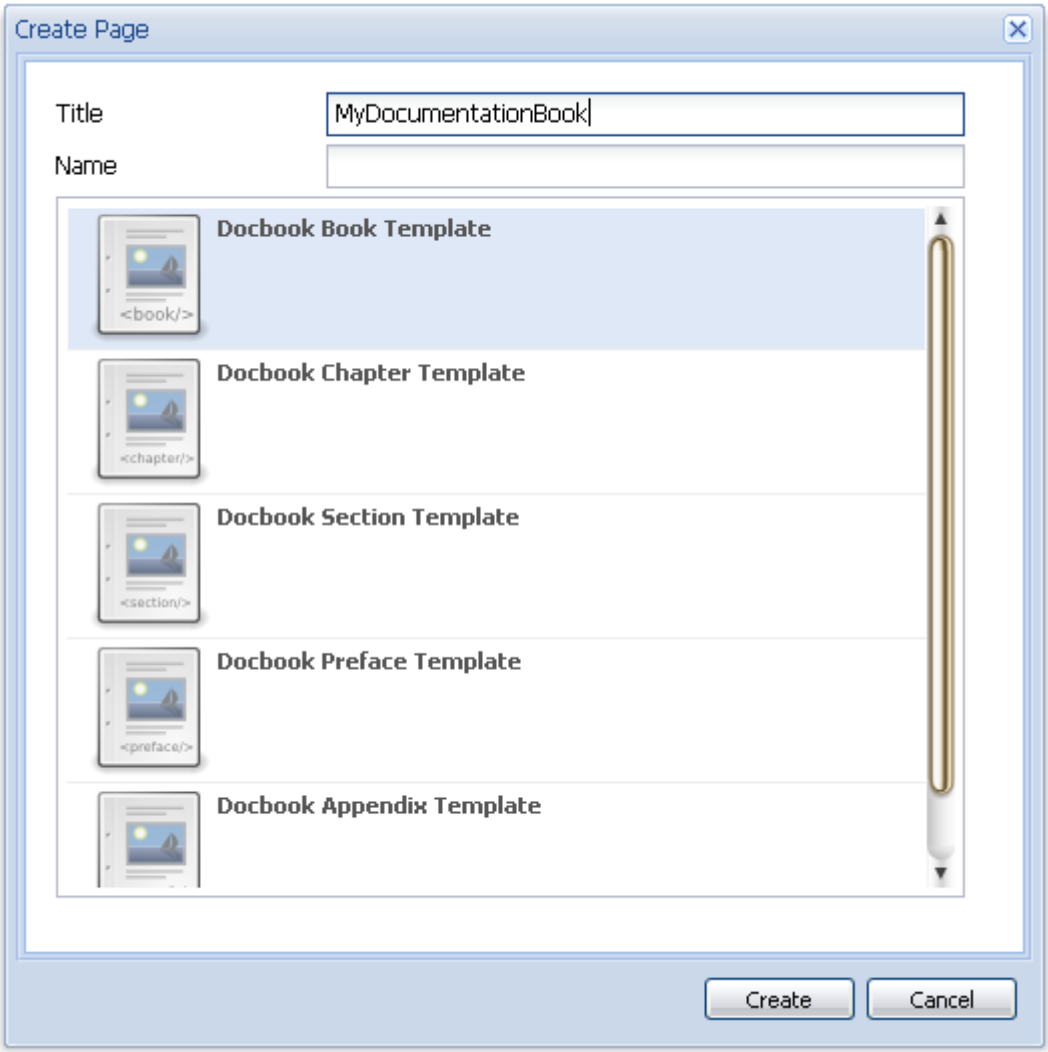
Comprehensive documentation is included with CQ. However, due to the fact that each installation of CQ can be extensively customized, CQ also allows you to extend the content of the documentation and online help.

12.1 How to extend the documentation and online help

Although closely related, there are different methods involved, depending on what your end-product is to be:

12.1.1 To extend the online help delivered with CQ

1. Click the **`Tools`** tab.
2. In the left pane, select **`Custom Documentation`**.
3. From the top menu, click the arrow next to **`New...`** then select **`New Page`**:

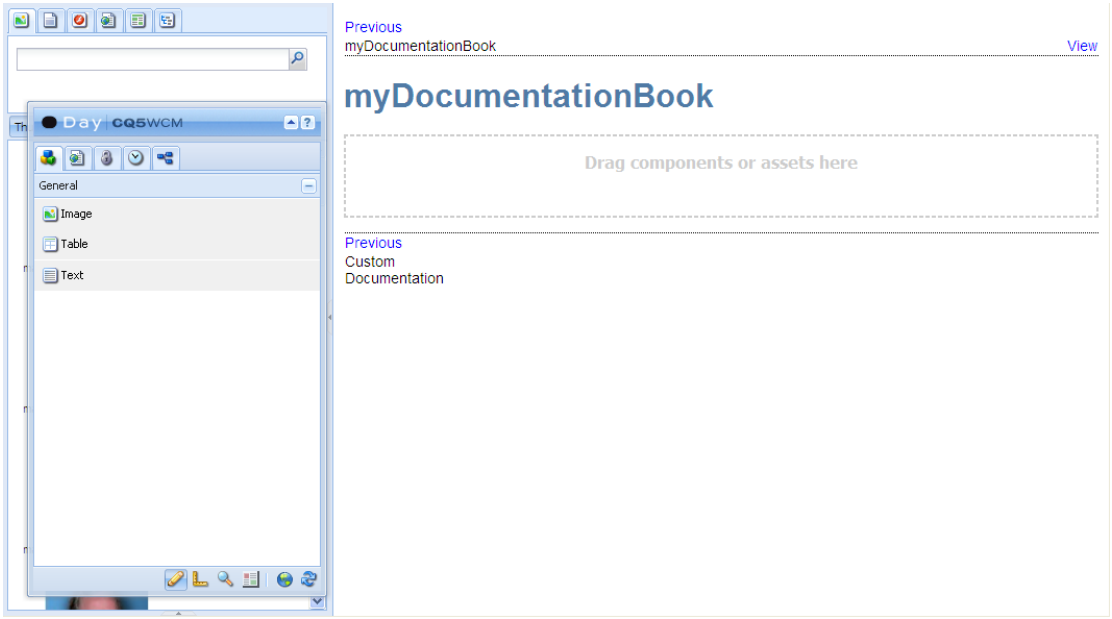


4. Enter a **`Title`** for the new DocBook element and a **`Name`** if you do not want the default.
5. Select a template corresponding to the DocBook element you want to create.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

6. Click **Create** to create the page.

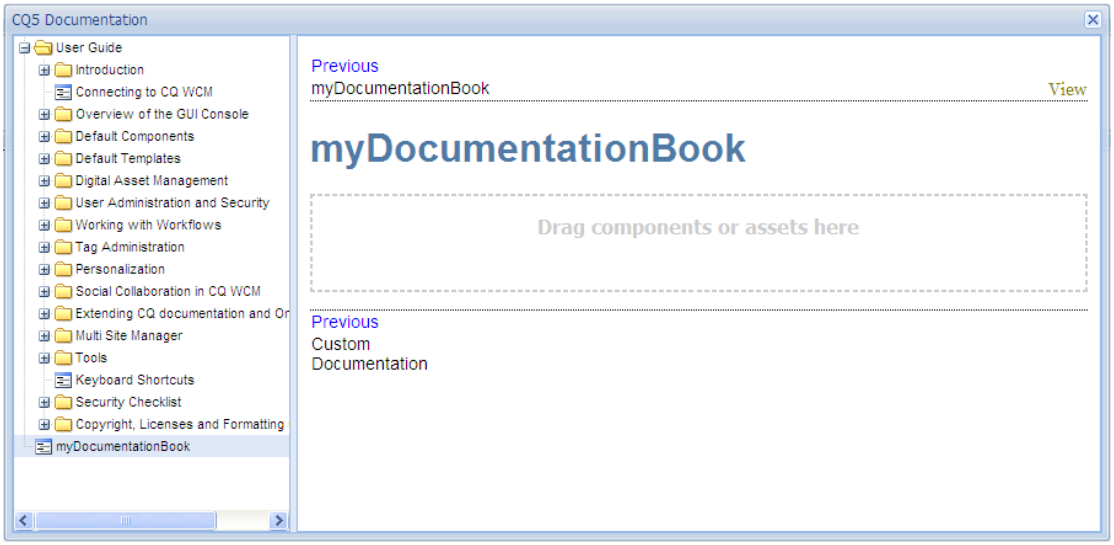
7. Double-click the page to open it for editing using the available components:



Note

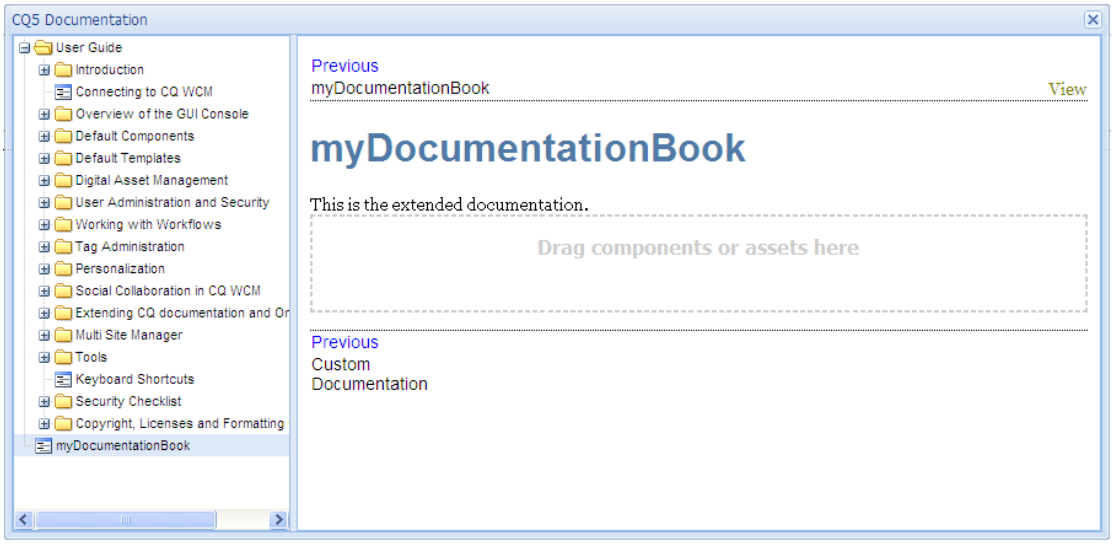
Ensure that the page is in **Edit** mode. This is shown by the **Edit**/**View** toggle link at the top right. You are in **Edit** mode when the link reads **View** (as it switches to View mode).

Or from within the Online Help browser:



To generate new content:

Copyright 1993-2009 Day Management AG



Important

The pages containing the online help *must not* be published (activated) as they contain proprietary information that is the property of Day.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

13 Multi Site Manager

This section describes the functionalities of the CQ5 Multi Site Manager (MSM).

With CQ5, you can manually manage multiple sites. When the number of sites in the same language is low (three to five), a manual process is most efficient. However, as soon as the number of sites grows or when multiple languages are involved, it becomes more efficient to use an automated functionality: the MSM. The MSM lets you define relations between the sites and also lets you define to what degree re-use or control is exerted on the different sites. The MSM, once set up, does this automatically.

MSM reduces the time it takes to manage your websites and increases re-use for:

- Different language editions of a website
- Automatic updates of one or more sites based on a source site. It allows you to:
  - Enforce a common base structure and common content across all versions of the website.
  - Provide structure and content that the sites can freely use, thus avoiding duplicated work and improving the unified look and feel.
  - Focus on the differences between the sites.
  - Manage the content based on a fine level of granularity as the inheritance of the content and structure can be managed at a page and/or paragraph level.

13.1 Typical Use Cases for the Multi Site Manager

This section describes several scenarios where using the MSM is easier than maintaining sites manually.

13.1.1 Multinational Site

ENT Corporation, a large distributed enterprise, has a large number of subsidiaries in various countries. All of them share a similar look-and-feel. These sites share various components with one another and most are centrally hosted.

Corporate Communications at ENT can use MSM features to propagate press release content to all the various press release pages of each of the countries' websites. This is done simply by making the press releases section of the source website mandatory.

Additionally, the Knowledge Management department at ENT has gathered a large collection of FAQs that apply to most countries. To allow the surfer to stay in his or her respective country's website yet have access to the FAQ appropriate to that country, this content can be offered as optional on the MSM source site. As a result, the owner of a particular country's web site can subscribe to the content that is appropriate for that site. The content is not "forced" on the owner of a site.

Some time later, because of the reorganization of the site, the press releases section is moved to another location in the navigation on the source site. Because of MSM, this change is reflected automatically in all subsidiary sites.

13.1.2 Multilingual Site

UNORG, a multinational organization, hosts a website in 15 languages.

Experience has shown that multilingual websites often share a number of characteristics:

Copyright 1993-2009 Day Management AG

- Content trees are not identical in different languages.
- There is almost never a "lead" language in which all the content is available.
- It is not just about text (images mean different things in different cultures).
- Internal document structures (content objects) in different languages, or even different geographies with the same language, are often different, for example, because of differing legal requirements.
- The "if-language-is-not-there-then-switch-to-default-language" scenario almost never works (a French surfer does not appreciate suddenly being thrown into a section of English content).

But, despite all of these differences between different language sections, there is also a certain coherence between the languages that needs to be maintained.

The Language Manager monitors the differences between language sections and allows for the clean up of any differences between the various language trees, thus helping to keep the sections synchronized.

13.1.3 Multinational Multilingual Site

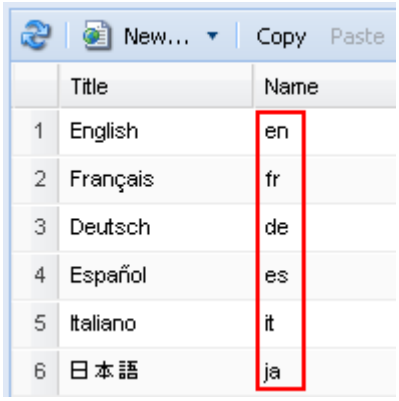
ENT Corporation, a large distributed enterprise, with a large number of subsidiaries also has a number of subsidiaries in countries like Switzerland, Belgium, and Canada that have to support a number of different languages per national site. But the set of supported languages per site must be decided on a per-country basis.

The combination of the Language Manager and the Multi-Site Manager lets you precisely control which content is visible in which country and how the various languages are managed and kept synchronized on a per-country level.

13.2 Managing Different Language Versions of a Website

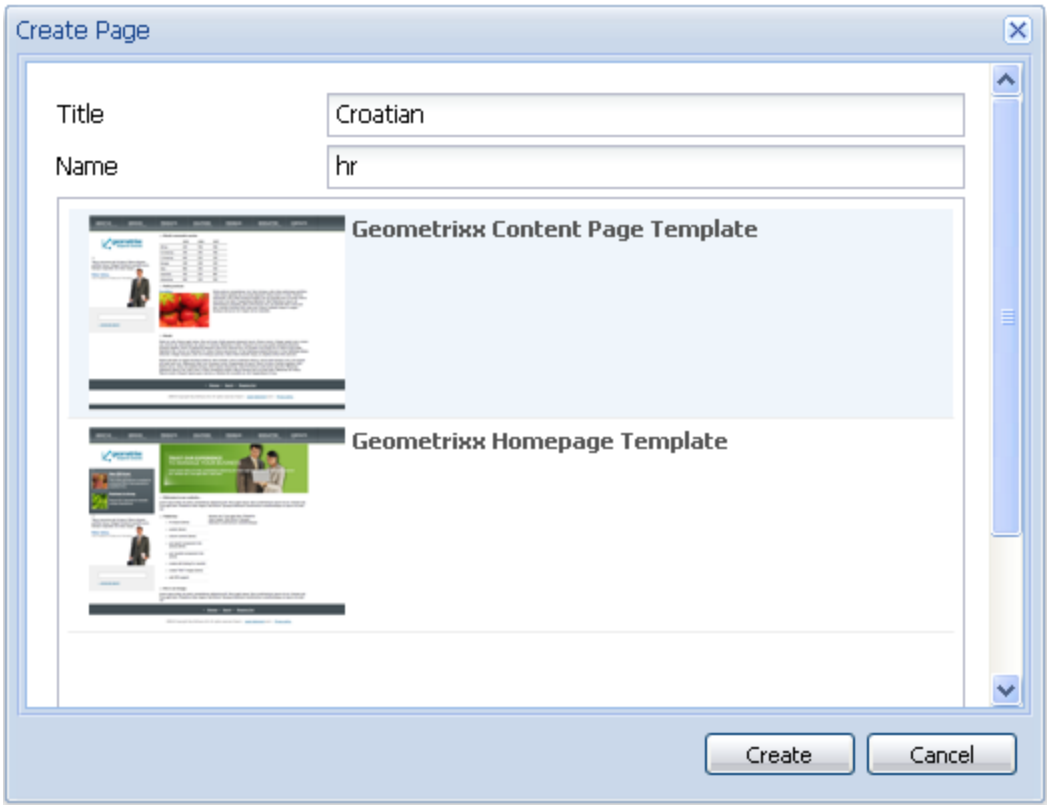
This section describes how to add a new language version of a web site using the **Language Copy** tool:

1. In the **`Websites`** tab, in the left pane, select the site.
2. In the right pane, make sure that the **`Names`** of the language pages are ISO language abbreviations (for example: en , fr, de). Check the ISO specifications for more information.



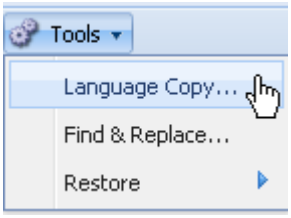
3. Add a new language branch to the site:
    1. Click **`New...`** .
    2. In the dialog, specify the **`Title`** and the **`Name`** (the name must be an ISO language abbreviation). Select the Template and click **`Create`**.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



4. In the **`Websites`** tab, in the left pane, select the site.

5. In the **`Tools`** menu, select **`Language Copy`**.



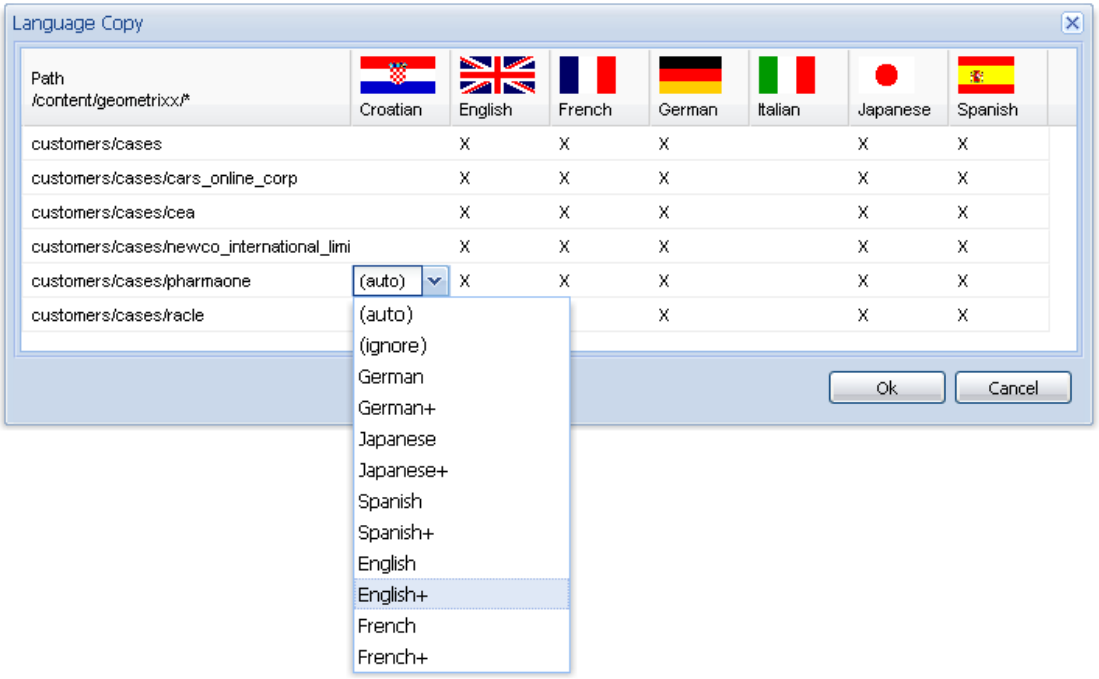
6. The **`Language Copy`** dialog opens. It displays a matrix of the language versions available for individual pages. An **`x`** in a language column means that the page is available within the language tree.

7. To copy an existing page or page tree to a specific language first select the appropriate empty cell. Then click the arrow and select the type of copy in the drop-down menu.

Copyright 1993-2009 Day Management AG

Table 13.1. Type of Language Copy

auto	Uses the behavior from parent pages
ignore	Cancels the copy for this page and its children
<language>+ (e.g. **French+**)	Copies the page and all its children from that language
<language> (e.g. **French**)	Copies only the page from that language



8. Click **OK** to close the dialog.

9. In the next dialog, click **Yes** to confirm the copy.

13.3 Managing the Translation of your Language Branches

When your website consists of several language branches and when you create a new page in your reference language branch, you can start a translation workflow that automatically creates new pages in the language branches of your choice and helps you translate the pages by displaying side-by-side the page to be translated and the reference page.

This procedure describes how to start the translation workflow and how to display the reference page beside the page that needs to be translated.

Important

The website must have at least two language branches.

1. In the **Siteadmin** tab create a new page in your reference language branch, for example, English.

2. Open the new page and add the desired text.

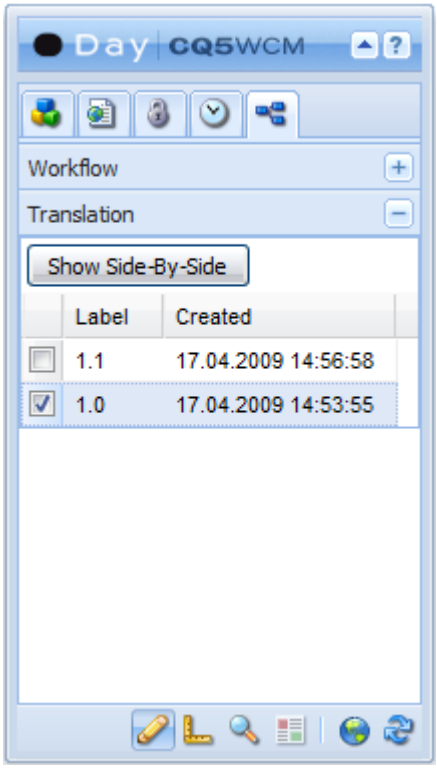
3. In the **Sidekick**, in the **Workflow** tab, select **Translation**:

Copyright 1993-2009 Day Management AG

1. Check the language branch(es) into which you would like to have a new page created.
2. In the **Workflow** drop-down menu, select **Translation**.
3. Click **Translate**.

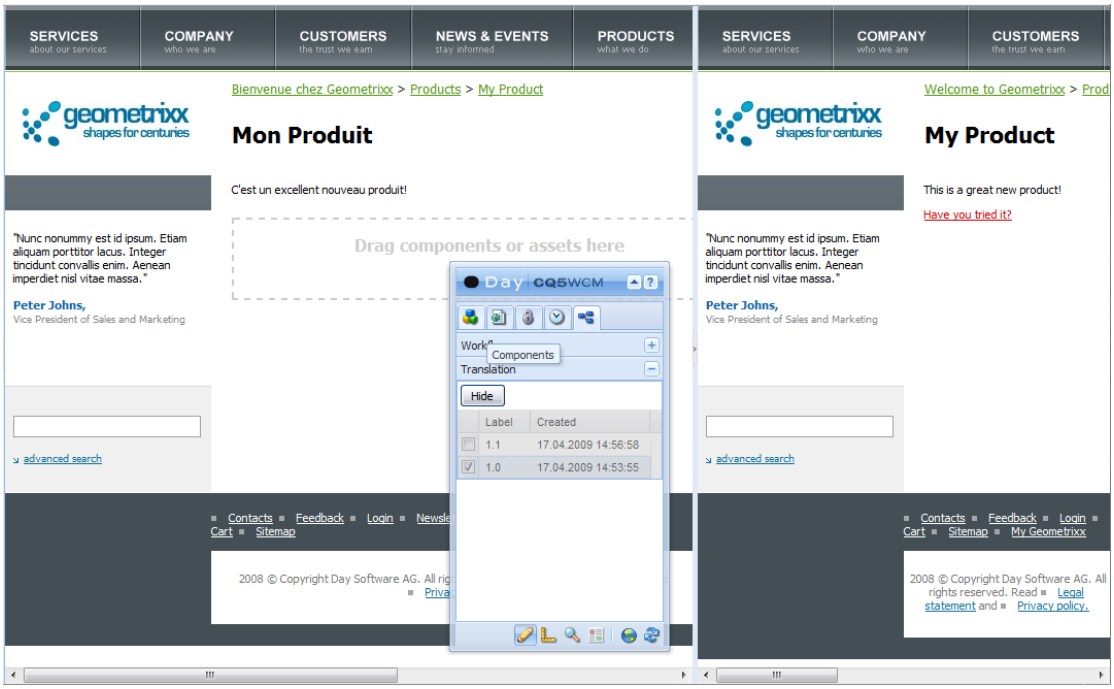
The reference page is being copied into the selected language branch(es).

4. Activate the reference page. A new version of the page is created.
5. Open the page that needs to be translated. Edit the text that has been copied from the reference page and translate it. Save your changes.
6. Open the reference page and add new content to it.
7. Activate the reference page. A new version of the page is created.
8. Open the page that needs to be translated.
9. In the **Sidekick**, in the **Workflow** tab, select **Translation** to see the changes that have been made in the reference page since a specified version. Check this version and click **Show Side-By-Side**.



10. The reference page is displayed beside the page that needs to be translated. The text that has been added since the selected version is red and underlined.

Copyright 1993-2009 Day Management AG



Note

The reference page is only displayed and cannot be edited.

11. Edit the text that needs to be translated and translate it. Save your changes.
12. To close the view of the reference page, click **`Hide`** in the Sidekick.

Repeat previous steps every time new content is added to the reference page and needs to be translated in one or more language branches.

13.4 Managing Blueprints and Live Copies

MSM lets you create a site (called a Live Copy) based on another site (called a Blueprint) and to actively manage the relationships between the Blueprint and the Live Copy. The Blueprint defines structure and content centrally. The structure and content can then be used on the Live Copy.

13.4.1 Creating a Live Copy

This section explains how to create a Live Copy, which is a copy of another site called a Blueprint and is actively linked to the Blueprint.

With CQ5 it is possible to:

- Create a Live Copy based on a predefined Blueprint
- Create a Live Copy based on an existing site or on any page and its sub pages

Note

A Live Copy can only be linked to one Blueprint.

A Blueprint can be linked to several Live Copies.

13.4.1.1 Creating a Live Copy based on a Blueprint

This section describes:

- how to create a Blueprint by defining an existing site as a Blueprint.

Copyright 1993-2009 Day Management AG

- how to create a Live Copy based on an existing Blueprint.

Note

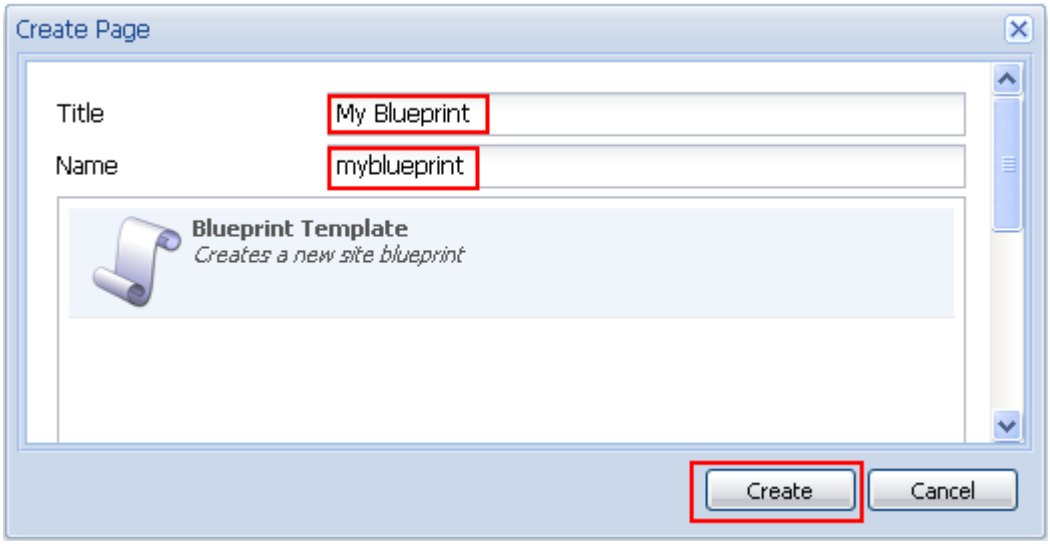
If the Blueprint already exists, the first section can be skipped.

13.4.1.1.1 Creating a Blueprint

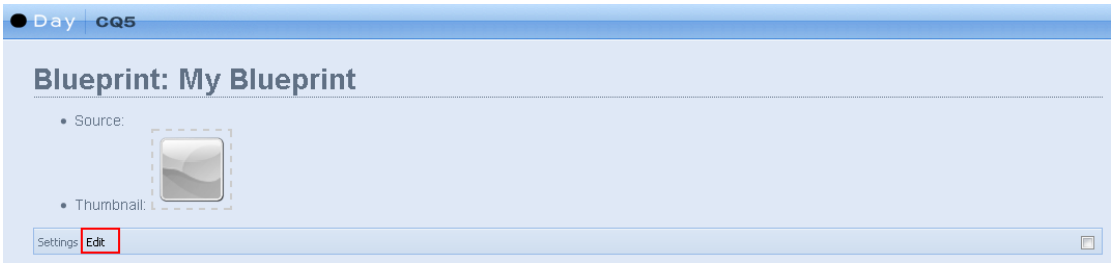
This section explains how to create a Blueprint by defining an existing site as Blueprint. A single Blueprint can be used to create as many Live Copies as needed.

To create a Blueprint:

1. Select the **Tools** tab.
2. In the left pane, under the **Tools** folder, select the **Blueprints** folder. In the right pane, click **New...** .
3. In the dialog, specify a title and a name. Click **Create** to close the dialog.



4. Refresh the Page List. Right-click the newly created page and select **Open** in the drop-down menu.
5. The page opens. Click **Edit**.



6. In the dialog, in the **Settings** tab:
   - **Name**: name the Blueprint
   - **Description**: describe the Blueprint (this is not mandatory)
   - **Source Path**: set the site path of the Blueprint:
     1. Click the arrow to open a dialog.
     2. In the dialog, navigate to the desired site. Click **OK** to close the dialog.

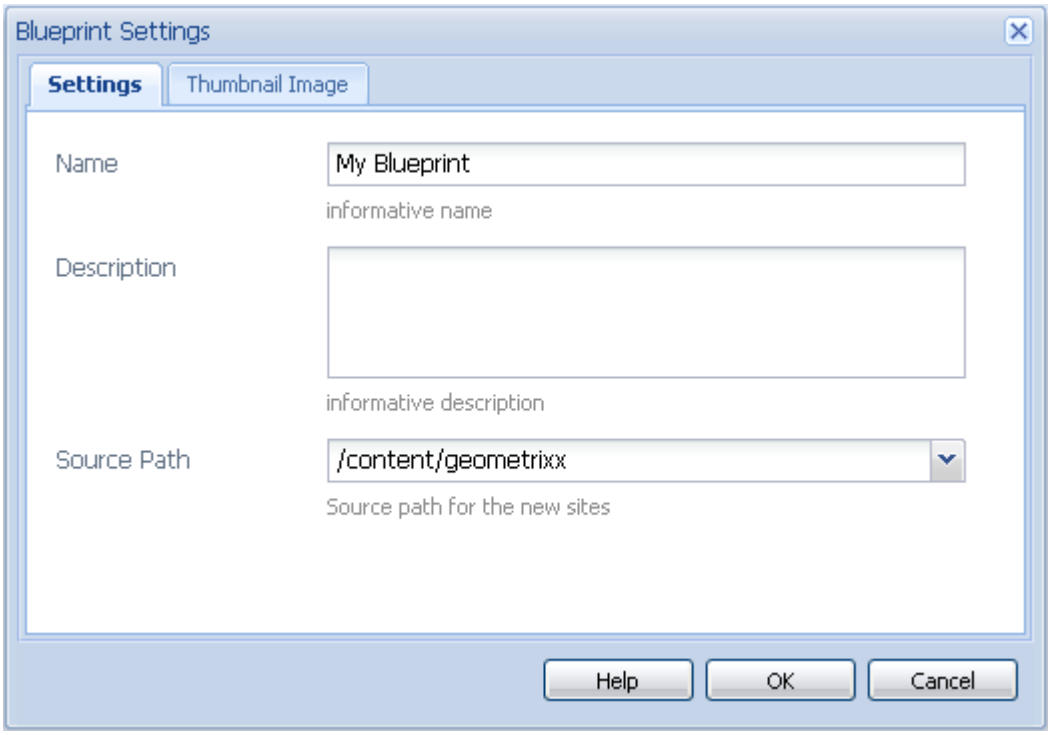
Copyright 1993-2009 Day Management AG

Note

You can also type the absolute path of the site.

Note

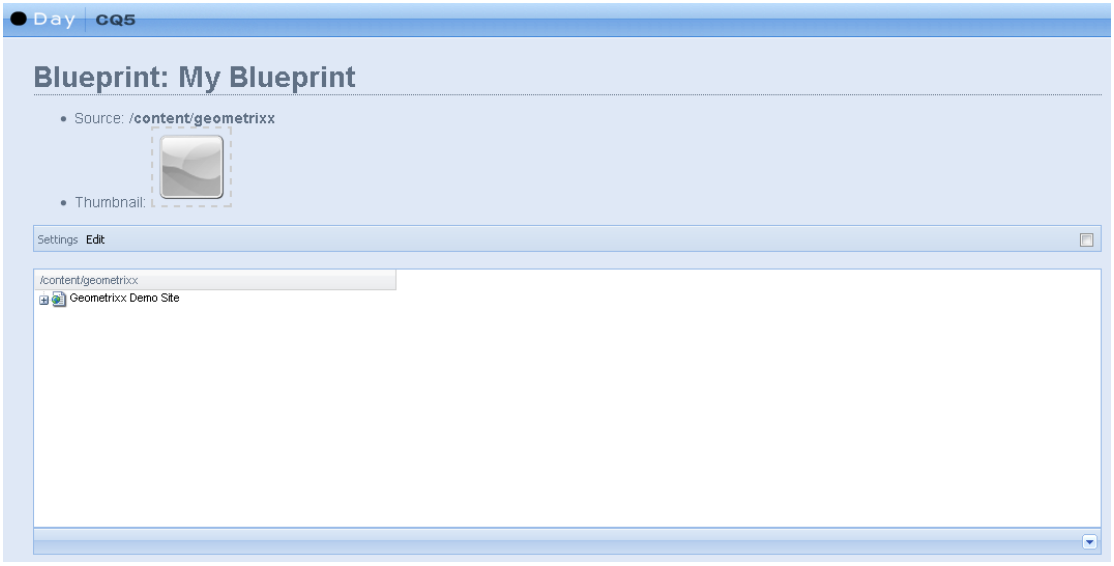
The Source site must have the same site structure as Geometrixx for its languages and chapters (children pages of the language pages).



7. In the **`Thumbnail Image`** tab: specify a thumbnail (this is not mandatory). It will appear in the dialog when creating a Live Copy.

8. Click **`OK`** to close the dialog.

9. The Blueprint definition page looks as follows:

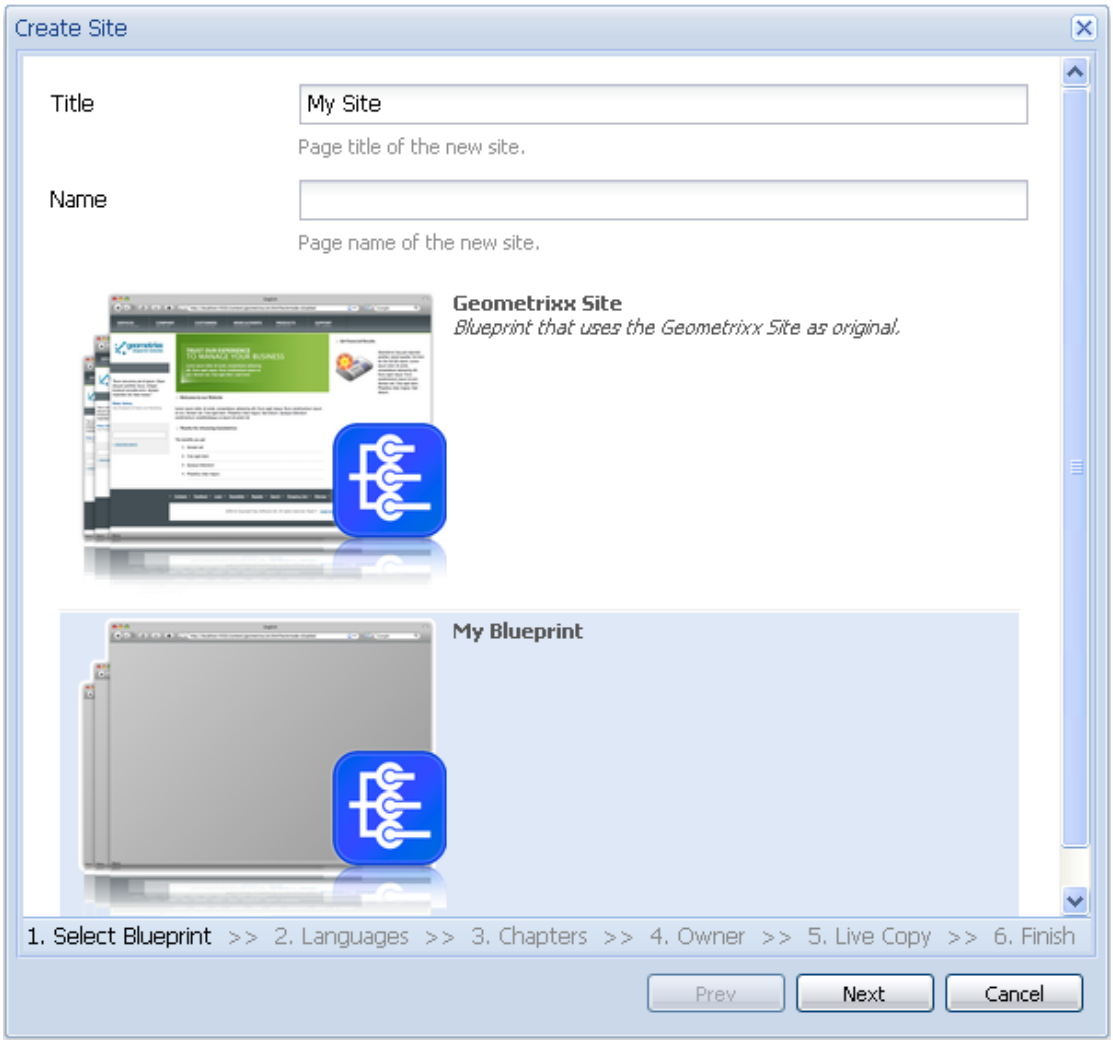


CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

13.4.1.1.2 Creating a Live Copy based on a Blueprint

This section describes how to create a Live Copy based on an existing Blueprint.

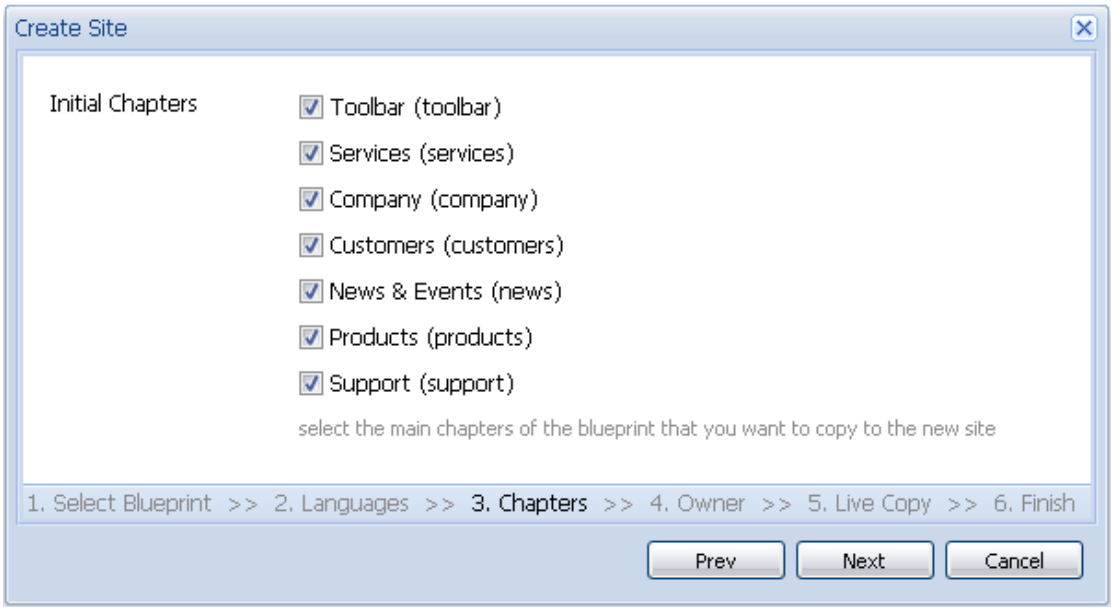
1. In the **Websites** tab, in the left pane, select the **Websites** folder.
2. Click the arrow beside the **New...** button and select **New Site...** .
3. In the dialog, specify a title and a name for your site and select the desired Blueprint. A sequence is displayed at the bottom of the dialog (the sequence might take a few seconds to be collated and displayed). Click **Next**.


Create Site
Title
My Site
Page title of the new site.
Name
Page name of the new site.
Geometrixx Site
Blueprint that uses the Geometrixx Site as original.
My Blueprint
1. Select Blueprint >> 2. Languages >> 3. Chapters >> 4. Owner >> 5. Live Copy >> 6. Finish
Prev
Next
Cancel

4. Select the languages of the Blueprint to be copied to the new site. Click **Next**.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

5. Select the main chapters of the Blueprint to be copied to the new site. Click Next.

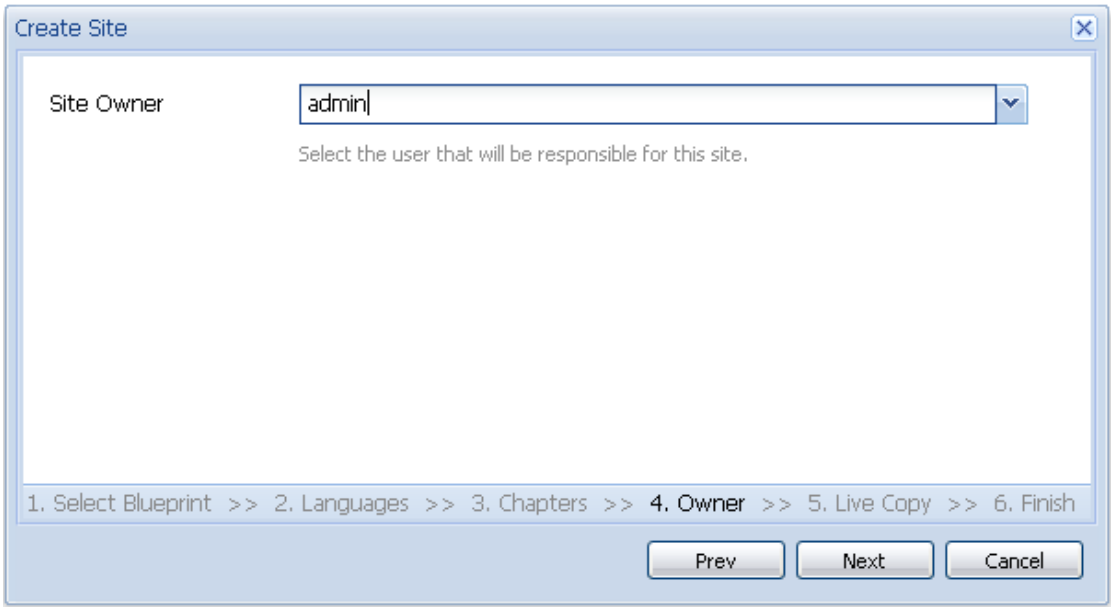

Create Site
Initial Chapters
Toolbar (toolbar)
Services (services)
Company (company)
Customers (customers)
News & Events (news)
Products (products)
Support (support)
select the main chapters of the blueprint that you want to copy to the new site
1. Select Blueprint >> 2. Languages >> 3. Chapters >> 4. Owner >> 5. Live Copy >> 6. Finish
Prev
Next
Cancel

6. Select the Site Owner account to be responsible for this site (e.g.: admin). Click **`Next`**.

Note

The Site Owner entry is saved but currently not used within CQ5.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG


Create Site
Site Owner
admin
Select the user that will be responsible for this site.
1. Select Blueprint >> 2. Languages >> 3. Chapters >> 4. Owner >> 5. Live Copy >> 6. Finish
Prev
Next
Cancel

7. Specify following parameters:

- **`Sync Trigger`** defines when the modifications on the Blueprint are propagated to the Live Copy. Choose one of the following values:
  - **`Never`**: the modifications will never be propagated. The Live Copy is then a plain copy of the Blueprint at the time of creation.
  - **`On Rollout`**: the modifications are propagated when rollout is activated. For more information on rollout, refer to the section called "Rolling out Changes on the Blueprint to the Live Copy".
  - **`On Modification`**: the modifications are propagated for each modification to the Blueprint.

    Note

    Be careful when choosing this option as it might cause a lot of network traffic.
  - **`On Activation`**: the modifications are propagated when the Blueprint is activated.
- **`Update Content`**:
  - If checked, modifications to the Blueprint will be propagated.
  - If unchecked, modifications to the Blueprint will not be propagated. This option should only be used in combination with a workflow.
- **`Enable Notification`**: if checked, you will be notified when the modifications are propagated.

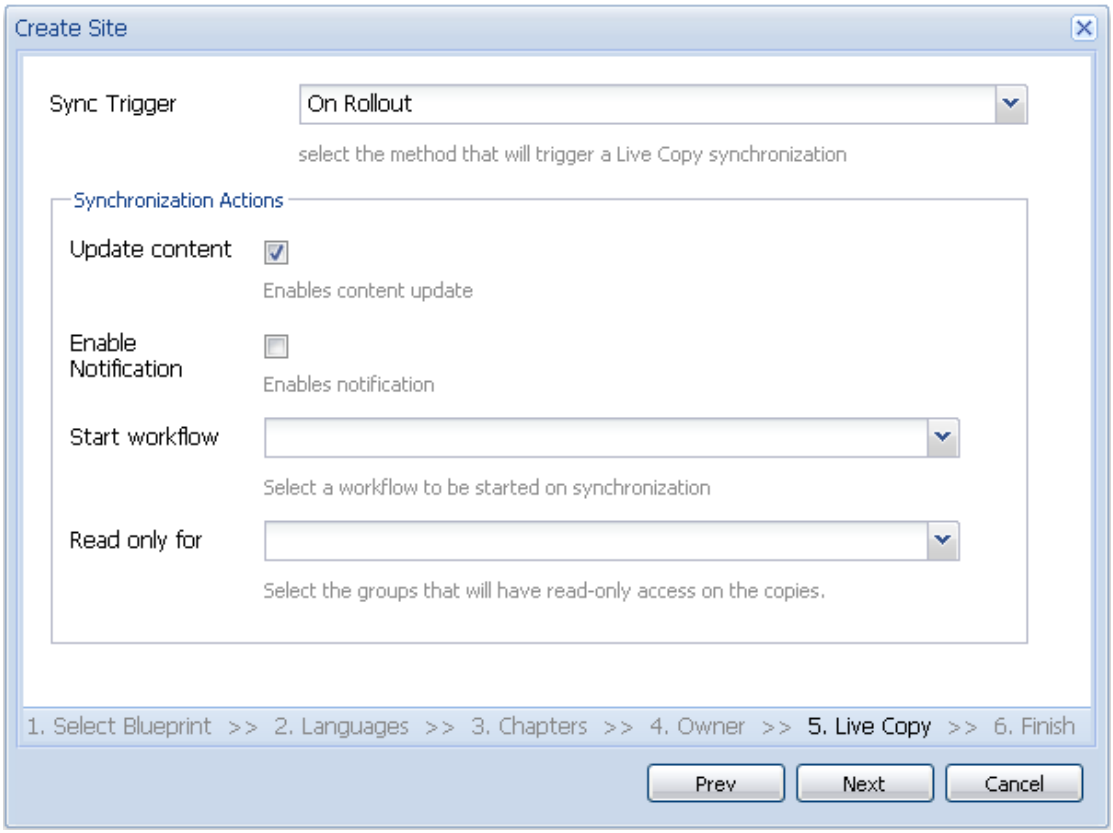
  Note

  In order to be notified, you first need to subscribe to rollout.
- **`Start Workflow`**: select the workflow to be started when the synchronization actions are triggered. Refer to Chapter 1, to define your own workflow.

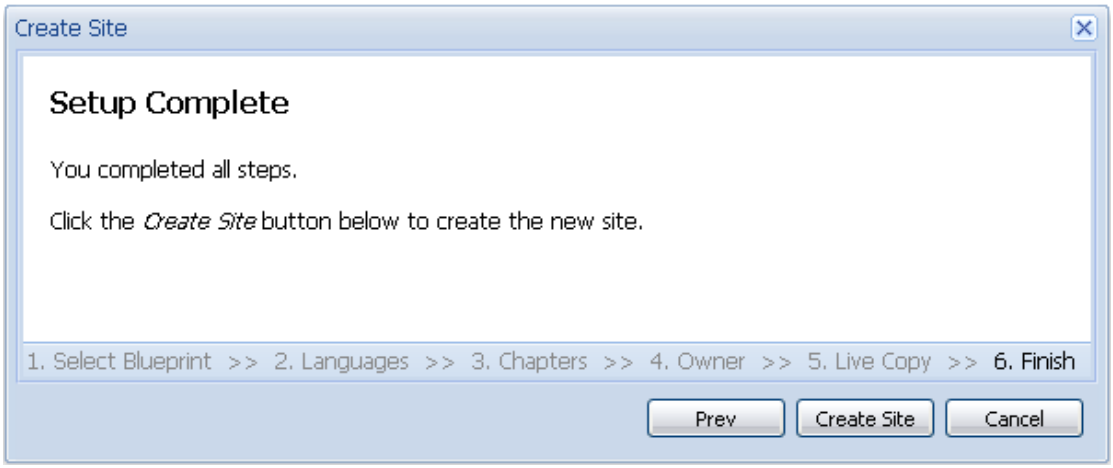
Copyright 1993-2009 Day Management AG

- **`Read only for`**: select the group that will have read-only access to the Live Copy. This option prevents a group from modifying the Live Copy.

Click **`Next`**.

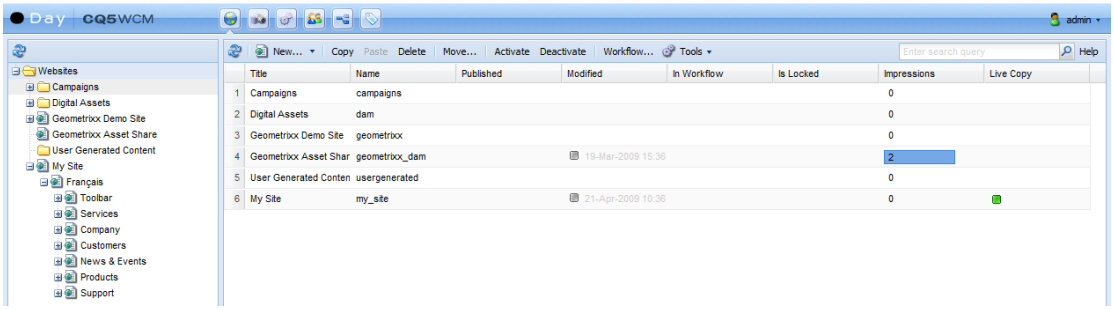

Create Site
Sync Trigger
On Rollout
select the method that will trigger a Live Copy synchronization
Synchronization Actions
Update content
Enables content update
Enable Notification
Enables notification
Start workflow
Select a workflow to be started on synchronization
Read only for
Select the groups that will have read-only access on the copies.
1. Select Blueprint >> 2. Languages >> 3. Chapters >> 4. Owner >> 5. Live Copy >> 6. Finish
Prev
Next
Cancel

8. Click **`Create Site`** to create the Live Copy.


Create Site
Setup Complete
You completed all steps.
Click the Create Site button below to create the new site.
1. Select Blueprint >> 2. Languages >> 3. Chapters >> 4. Owner >> 5. Live Copy >> 6. Finish
Prev
Create Site
Cancel

9. When the Live Copy is created, it is displayed in the **`Websites`** tab:

Copyright 1993-2009 Day Management AG



13.4.1.2 Creating a Live Copy based on an existing Site

To create a Live Copy based on an existing site or on any page and its sub pages:

1. In the **Websites** tab, in the left pane, select the location where the Live Copy will be created.
2. In the right pane, click the arrow beside **New...**, then select **New Live Copy...** .
3. In the dialog, specify following parameters:
   - **Title**: choose a title for the Live Copy.
   - **Name**: choose a name for the Live Copy.
   - **Live Copy From**: define the Source path:
     1. Click the arrow to open a dialog.
     2. Navigate to the desired site or sub-site and click **OK** to close the dialog.

     Note

     You can also type the absolute path of the site.
   - **Sync Trigger** defines when the modifications on the Blueprint are propagated to the Live Copy. Choose one of the following values:
     - **Never**: the modifications will never be propagated. The Live Copy is then a plain copy of the Blueprint at the time of creation.
     - **On Rollout**: the modifications are propagated when rollout is activated. For more information on rollout, refer to the section called “Rolling out Changes on the Blueprint to the Live Copy”.
     - **On Modification**: the modifications are propagated for each modification to the Blueprint.

       Note

       Be careful when choosing this option as it might cause a lot of network traffic.
     - **On Activation**: the modifications are propagated when the Blueprint is activated.
   - **Update Content**:
     - If checked, modifications to the Blueprint will be propagated.
     - If unchecked, modifications to the Blueprint will not be propagated.. This option should only be used in combination with a workflow.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

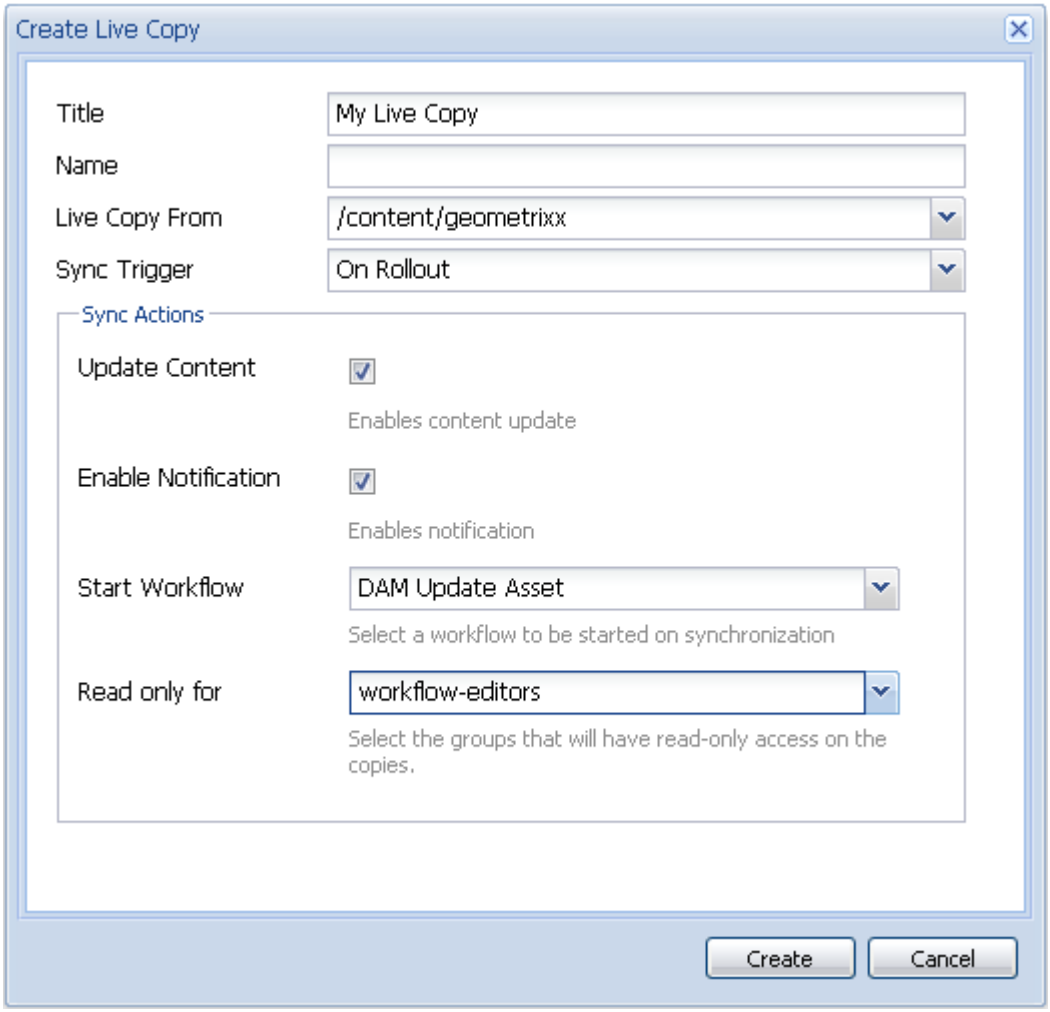
- **`Enable Notification`**: if checked, you will be notified when the modifications are propagated.

  Note

  In order to be notified, you first need to subscribe to rollout.

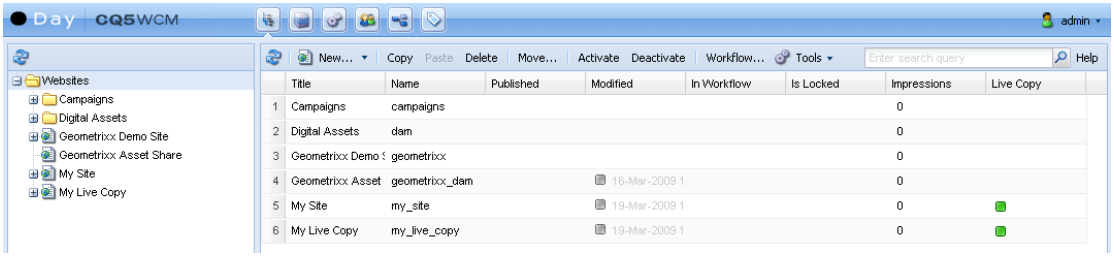
- **`Start Workflow`**: select the workflow to be started when the synchronization actions are triggered. Refer to Chapter 1, to define your own workflow.

- **`Read only for`**: select the group that will have read-only access to the Live Copy. This option prevents a group from modifying the Live Copy.



4. Click **`Create`** to close the dialog and create the Live Copy.

5. When the Live Copy is created, it is displayed in the **`Websites`** tab.



Copyright 1993-2009 Day Management AG

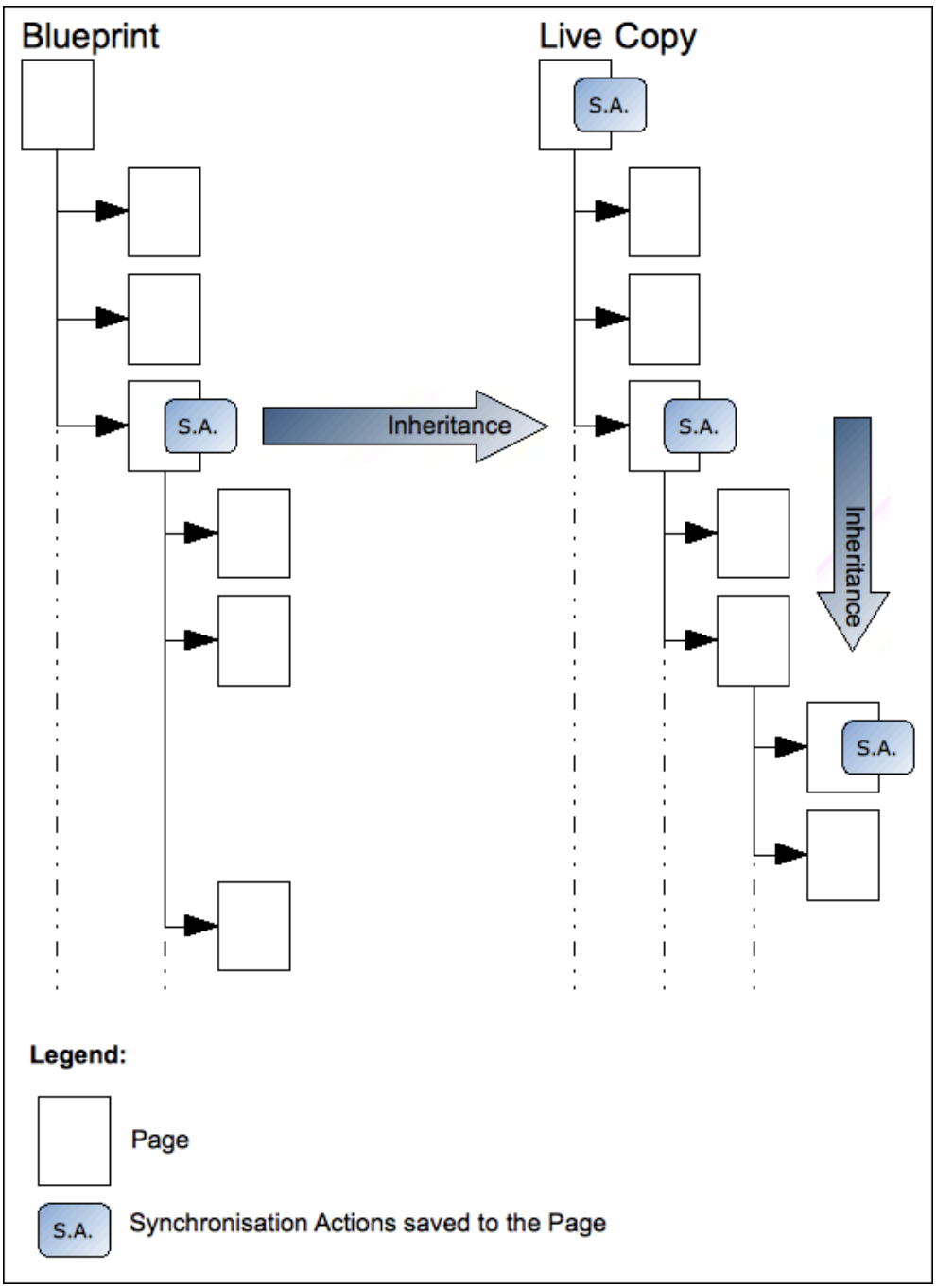
13.4.2 Configuring Synchronization Actions between a Blueprint and its Live Copy

CQ5 lets you configure synchronization actions between a Blueprint and its Live Copy. These actions can be configured on both a Blueprint and/or on a Live Copy page. When configuring the synchronization actions you should be aware of the following:

- When a Blueprint is created, no synchronization actions are saved to the Blueprint pages.
- When configuring a synchronization action on a Blueprint page, the action is only saved to the selected Blueprint page. Blueprint children pages do not inherit actions.
- When a Live Copy is created, the synchronization actions are only saved to the Live Copy root page.
- When configuring a synchronization action on a Live Copy page, the action is only saved to the selected Live Copy page.
- When you select a Live Copy page (called page A here) that does not have any actions explicitly saved to it, the tree is scanned upwards until the first parent page with actions is found:
  - those actions are then used for the selected page (but not saved to the selected page) if no actions are saved to the corresponding Blueprint page of the Live Copy page A.
  - if actions are saved to the corresponding Blueprint page of the Live Copy page A, those actions are then used for the selected page A (but not saved to the selected page A).

  Following graphic explains the inheritance process:

Copyright 1993-2009 Day Management AG



13.4.2.1 Configuring Synchronization Actions on a Blueprint page

To configure synchronization actions on a Blueprint page:

1. In the **`Websites`** tab, in the right panel, right-click the Blueprint page and select **`Properties`** in the drop-down menu.

   Note

   You can also open the page and click **`Page Properties...`** in the Sidekick.

2. In the dialog, select the **`Blueprint`** tab:

   - **`Current Live Copies`**: lists all the Live Copies currently linked to this Blueprint. It is not possible to modify this list.

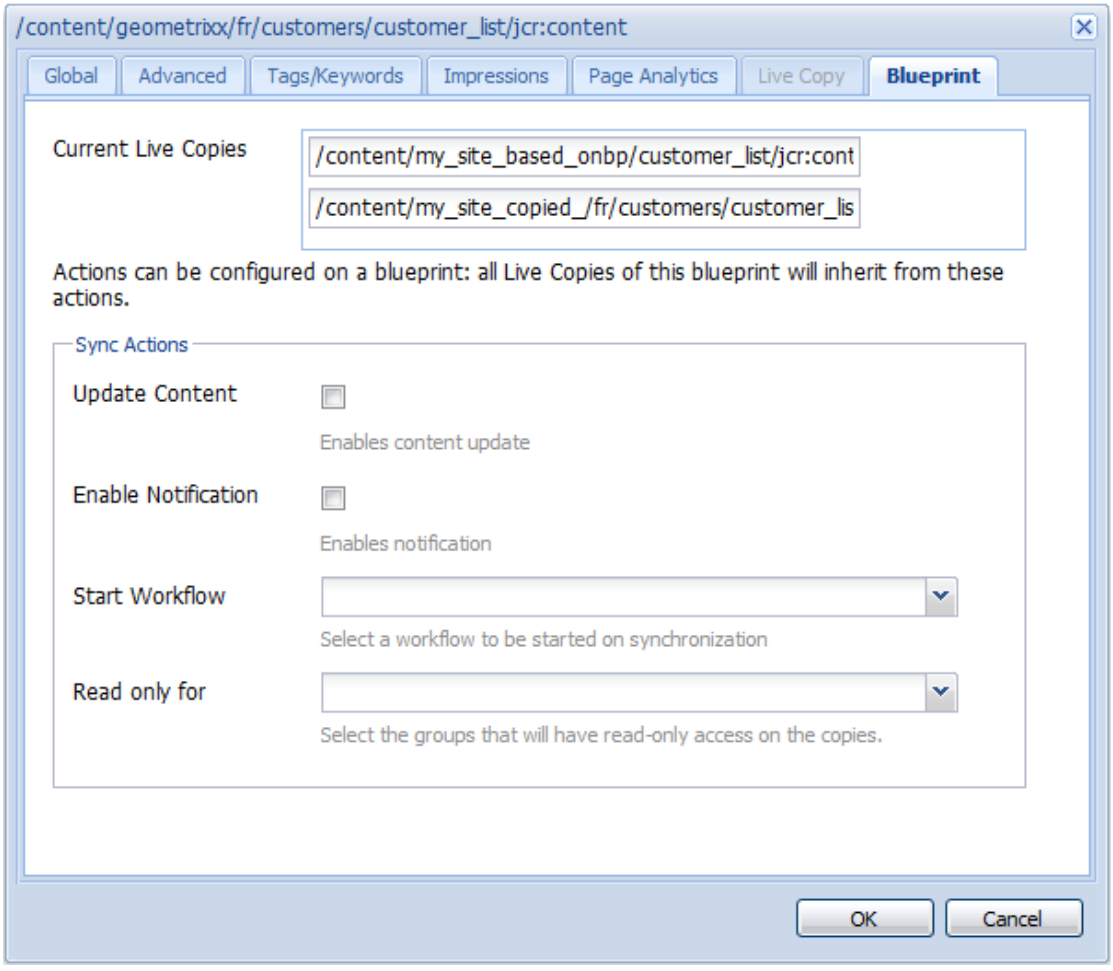
CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

- **`Update Content`**:
  - If checked, modifications to the Blueprint will be propagated.
  - If unchecked, modifications to the Blueprint will not be propagated.. This option should only be used in combination with a workflow.
- **`Enable Notification`**: if checked, you will be notified when the modifications are propagated.

> **Note**
>
> In order to be notified, you first need to subscribe to rollout.

- **`Start Workflow`**: select the workflow to be started when the synchronization actions are triggered. Refer to Chapter 1, to define your own workflow.
- **`Read only for`**: select the group that will have read-only access to the Live Copy. This option prevents a group from modifying the Live Copy.

> **Note**
>
> If the selected page is also a Live Copy, the **`Live Copy`** tab is activated. Otherwise, it is deactivated.



3. Click **`OK`** to close the dialog.

Copyright 1993-2009 Day Management AG

13.4.2.2 Configuring Synchronization Actions on a Live Copy page

To configure synchronization actions for a Live Copy page:

1. In the **Websites** tab, in the right panel, right-click the Live Copy page and select **Properties**.

   Note

   You can also open the page and click **Page Properties...** in the Sidekick.

2. In the dialog, select the **Live Copy** tab:

   - **Live Copy from**: displays the Blueprint path.
   - **Live Copy cancelled**: if checked, the Live Copy page is not linked to the Blueprint anymore.
   - Informative text:
     - Displays as follows when the current page is the Live Copy root page:

       The sync configuration is stored on the current page, which is the root page of the Live Copy. Child pages of the current page inherit this configuration, unless they have configurations of their own.
       Note: Disabled actions are inherited from the blueprint and cannot be modified.

     - Displays as follows when the actions are inherited from a parent page:

       The sync configuration is inherited from a parent page. Changes made below will cancel the inheritance and store the configuration on the current page.
       Note: Disabled actions are inherited from the blueprint and cannot be modified.

     - Displays as follows when the actions are saved to the current page:

       The sync configuration is stored on the current page. You can reset the configuration in order to inherit the configuration from a parent page.
       Note: Disabled actions are inherited from the blueprint and cannot be modified.

       It is possible to restore parent configurations by clicking **reset the configuration**.

   - **Sync Trigger** defines when the modifications on the Blueprint are propagated to the Live Copy. Choose one of the following values:
     - **Never**: the modifications will never be propagated. The Live Copy is then a plain copy of the Blueprint at the time of creation.
     - **On Rollout**: the modifications are propagated when rollout is activated. For more information on rollout, refer to the section called “Rolling out Changes on the Blueprint to the Live Copy”.
     - **On Modification**: the modifications are propagated for each modification to the Blueprint.

       Note

       Be careful when choosing this option as it might cause a lot of network traffic.

     - **On Activation**: the modifications are propagated when the Blueprint is activated.
   - **Update Content**:
     - If checked, modifications to the Blueprint will be propagated.

Copyright 1993-2009 Day Management AG

- If unchecked, modifications to the Blueprint will not be propagated.. This option should only be used in combination with a workflow.

- **`Enable Notification`**: if checked, you will be notified when the modifications are propagated.

Note

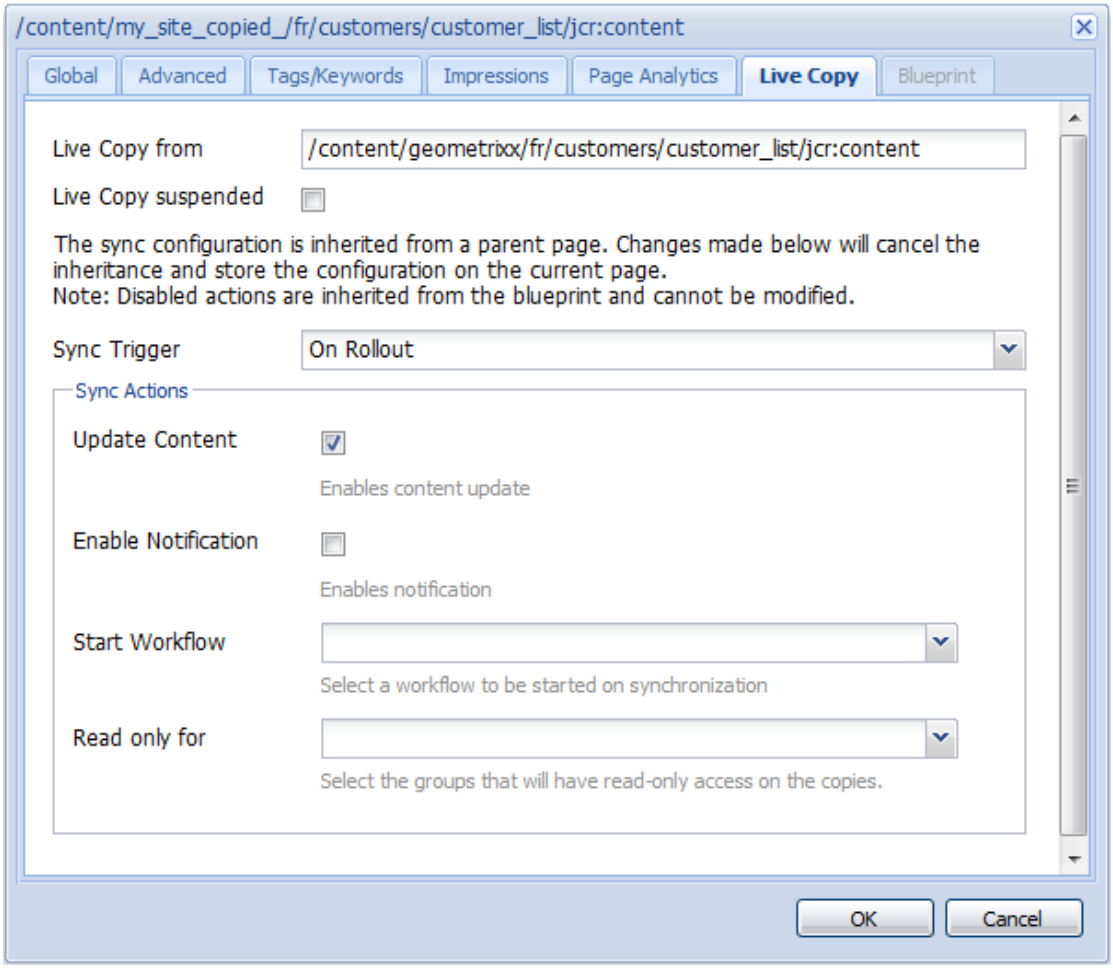
In order to be notified, you first need to subscribe to rollout.

- **`Start Workflow`**: select the workflow to be started when the synchronization actions are triggered. Refer to Chapter 1, to define your own workflow.

- **`Read only for`**: select the group that will have read-only access to the Live Copy. This option prevents a group from modifying the Live Copy.

Note

If the selected page is also a Blueprint, the **`Blueprint`** tab is activated. Otherwise, it is deactivated.



3. Click **`OK`** to close the dialog.

13.4.3 Rolling out Changes on the Blueprint to the Live Copy

Rolling out consist of propagating the changes made on the Blueprint to the Live Copy.

This section describes how to roll out the changes from the Blueprint to the Live Copy.

Copyright 1993-2009 Day Management AG

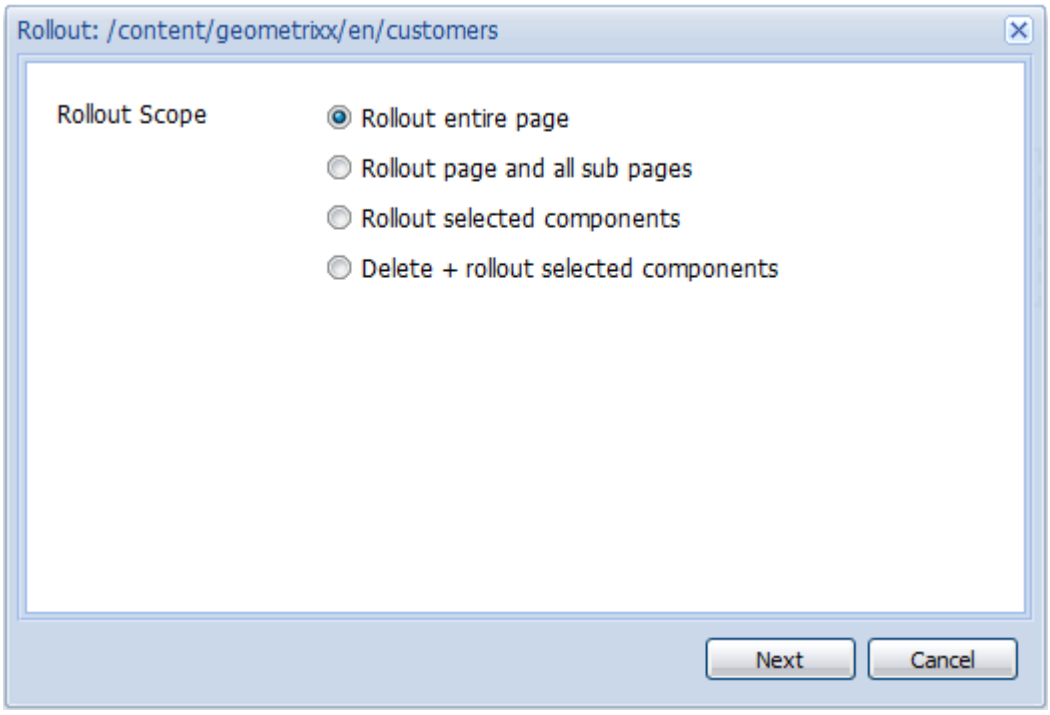
The following rules apply for a rollout:

- A rollout can only be triggered on the Blueprint. There is one exception to this rule: when a paragraph is re-locked on a Live Copy page, a rollout is automatically triggered on a Live Copy.
- A rollout can be triggered for one page or for a page and all its sub-pages.
- A rollout can be triggered for a paragraph.

To roll out the changes from the Blueprint to the Live Copy:

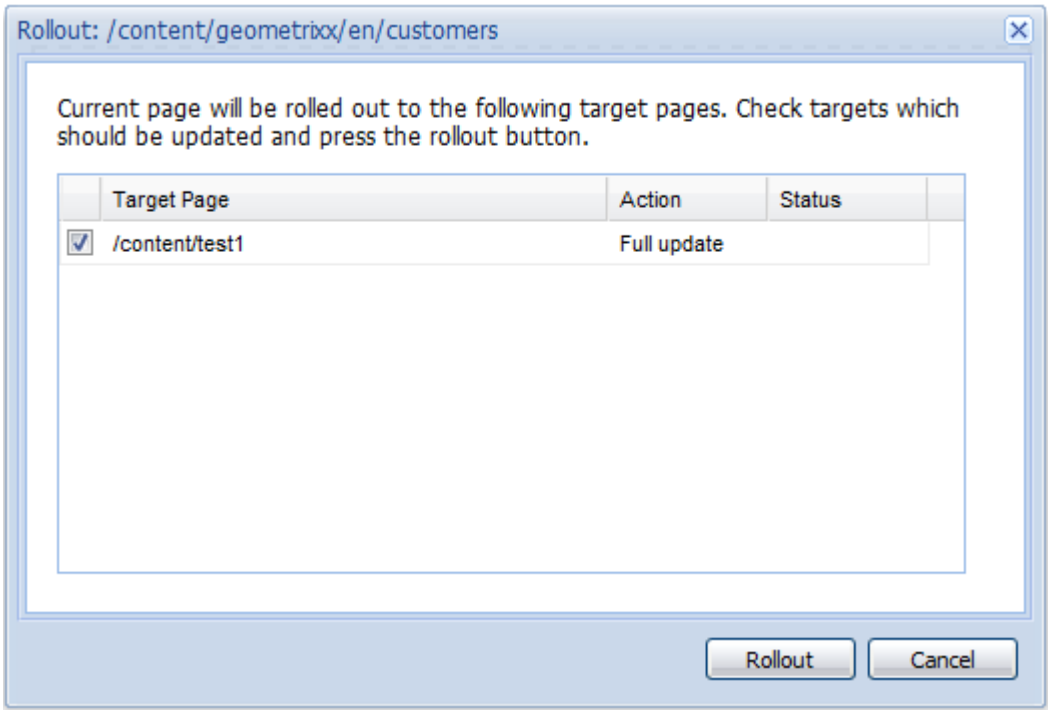
1. Open the Blueprint page.
2. In the Sidekick, in the **Page** tab, select **Rollout Page**.
3. In the dialog, select the **Rollout Scope**:
   - **Rollout entire page** to only roll out the page.
   - **Rollout page and all sub pages** to roll out the page and all its sub pages.
   - **Rollout selected components** to roll out the paragraphs selected in the page.
   - **Delete + rollout selected components**: when this option is checked, the selected components are deleted on the Blueprint and the deletion of the selected components is propagated to the Live Copies.

   Click **Next** to reach the next step.



4. In the next dialog, select the Live Copy(ies) to be updated and click **Rollout**.

Copyright 1993-2009 Day Management AG



Note

In a Live Copy page, the **`Rollout Page`** button is deactivated.

Note

Media assets originating from CQ DAM (Digital Asset Management) are referenced in Blueprints and Live Copies. When an asset is modified in the DAM, the modified asset is rendered in the Blueprint and the Live Copy. A rollout is not needed to propagate the change. This asset has its own life cycle and is independent from the Blueprint and the Live Copy.

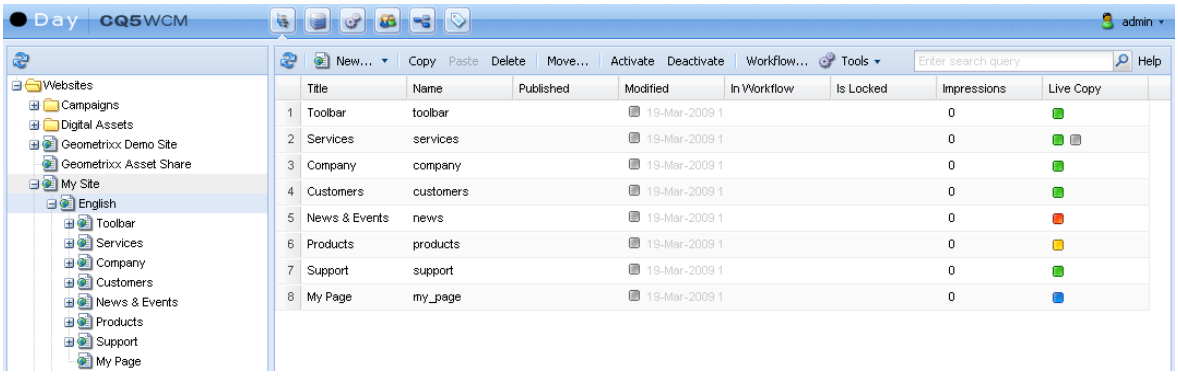
13.4.4 Live Copy status at Page and at Paragraph level

Live Copy status are displayed as follows:

- the **`Websites`** tab displays colored indicators for the Live Copy pages.
- the Live Copy page displays visual indicators for all its paragraphs.

13.4.4.1 Live Copy Page Status

The **`Websites`** tab displays colored indicators for the Live Copy pages. Moving the mouse cursor over the icon displays the detailed status.



Copyright 1993-2009 Day Management AG

A Live Copy page has one of the following icons:

Table 13.2.

Icon	Description
(green)	Live Copy from the Blueprint page <path of the page>.
(grey)	The page contains paragraphs for which Live Copy has been cancelled (lock open on the Live Copy).
(blue)	The page has been created on the Live Copy.
(red)	The Blueprint page <path of the page> has been deleted.
(yellow)	Either the Live Copy or the Blueprint page <path of the page> has been locally modified.

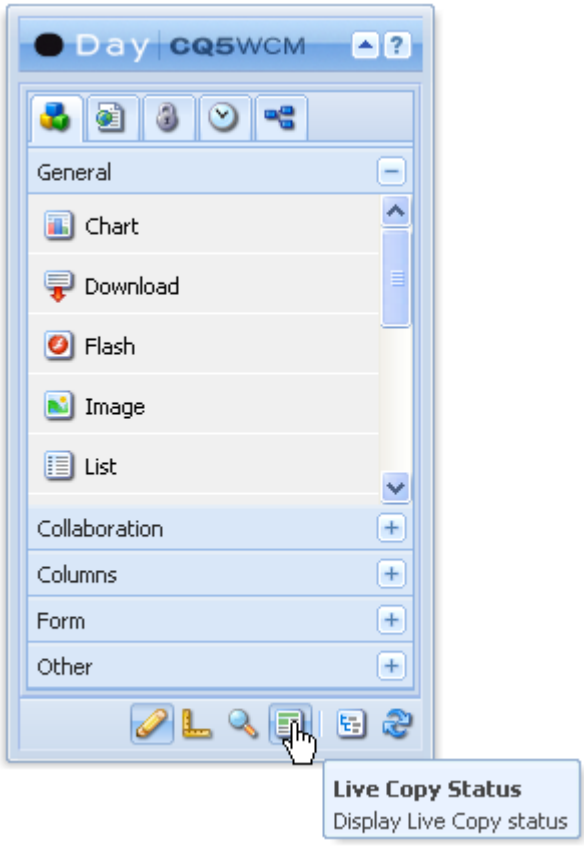
13.4.4.2 Live Copy Paragraph status

13.4.4.2.1 Viewing the paragraph status of a Live Copy page

To view the status of a Live Copy paragraph:

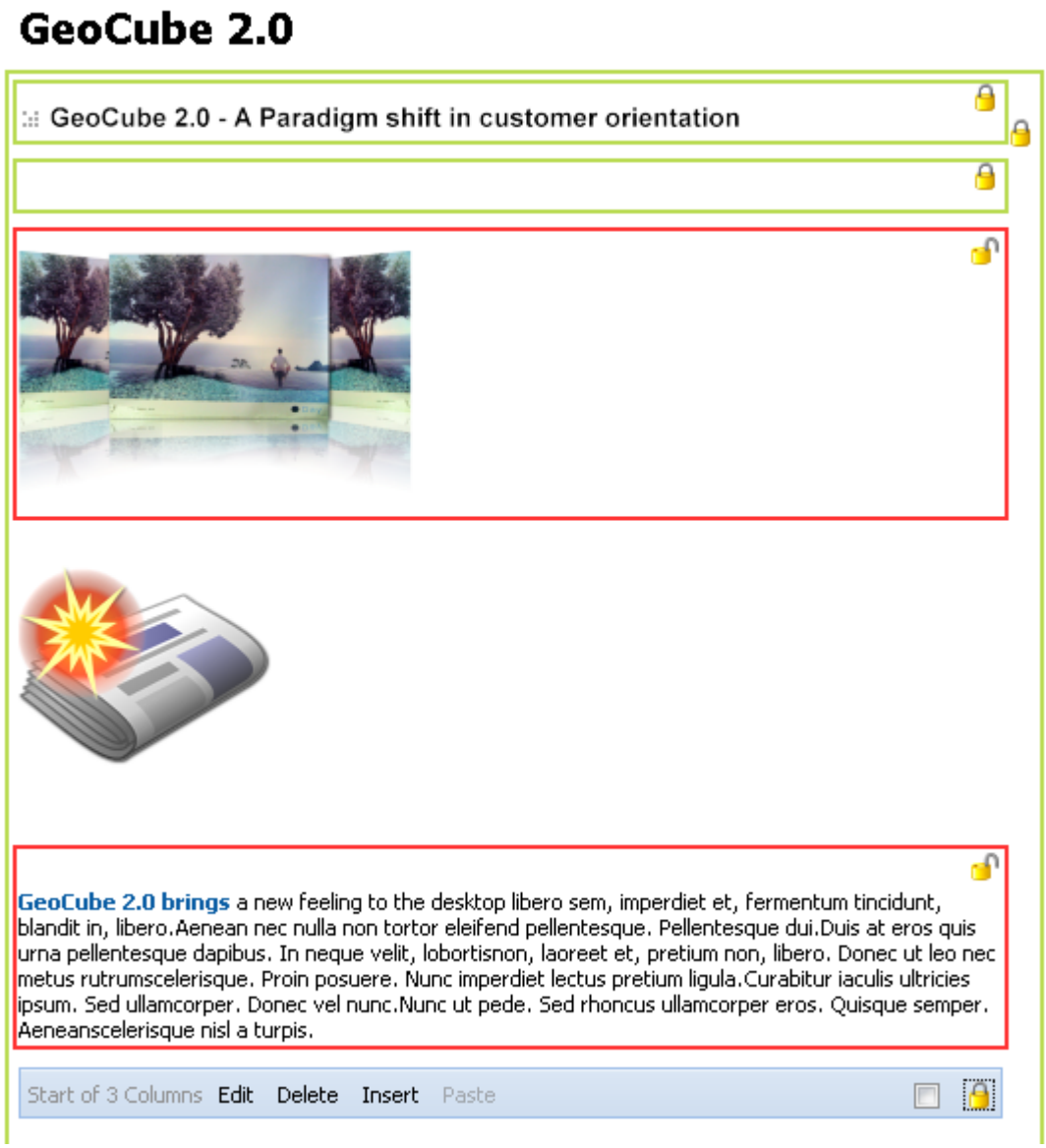
1. Open the Live Copy page.
2. In the Sidekick, click the **`Live Copy Status`** button to view the status of all the paragraphs of the page:

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG



3. The status of the paragraphs are displayed on the page as follows:

Copyright 1993-2009 Day Management AG


GeoCube 2.0
GeoCube 2.0 - A Paradigm shift in customer orientation
GeoCube 2.0 brings a new feeling to the desktop libero sem, imperdiet et, fermentum tincidunt, blandit in, libero.Aenean nec nulla non tortor eleifend pellentesque. Pellentesque dui.Duis at eros quis urna pellentesque dapibus. In neque velit, lobortisnon, laoreet et, pretium non, libero. Donec ut leo nec metus rutrumscelerisque. Proin posuere. Nunc imperdiet lectus pretium ligula.Curabitur iaculis ultricies ipsum. Sed ullamcorper. Donec vel nunc.Nunc ut pede. Sed rhoncus ullamcorper eros. Quisque semper. Aeneanscelerisque nisl a turpis.
Start of 3 Columns Edit Delete Insert Paste

Each paragraph within a Live Copy page has one of the following statuses:

Table 13.3.

Frame color / Icon	Description
(green frame)	The Live Copy paragraph is in lockstep with the Blueprint paragraph: modifications to the Blueprint paragraph will be propagated to the Live Copy paragraph. This is the default status after creating a Live Copy page.
(red frame)	The Live Copy paragraph is not in lockstep with the Blueprint paragraph. Deletion, update or reordering of the Blueprint paragraph does not affect the Live Copy paragraph anymore. The paragraph has this status when:

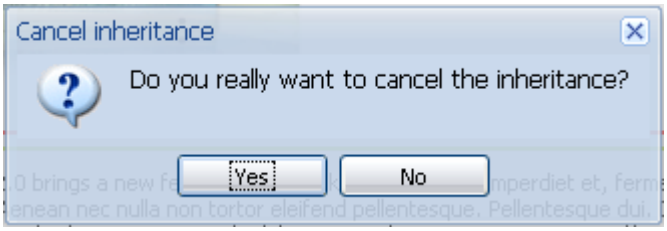
Copyright 1993-2009 Day Management AG

Frame color / Icon	Description
	• the Live Copy paragraph has been modified (e.g. when modifying some text or styles) • the inheritance has been cancelled by clicking the lock icon of the Live Copy paragraph When a Live Copy paragraph container (e.g. a paragraph system) has this status, the order of the paragraphs inside the container is not inherited from the Blueprint anymore.
no frame / no icon	The paragraph has been created in the Live Copy page. It does not appear in the Blueprint page.

13.4.4.2.2 Cancelling the inheritance of a paragraph

To cancel the inheritance of a paragraph:

1. Follow the steps according to the procedure in the section called “Viewing the paragraph status of a Live Copy page”.
2. On the page displaying the status of the appropriate paragraph, click the closed lock icon of that paragraph.
3. In the dialog, click **Yes** to cancel the inheritance .

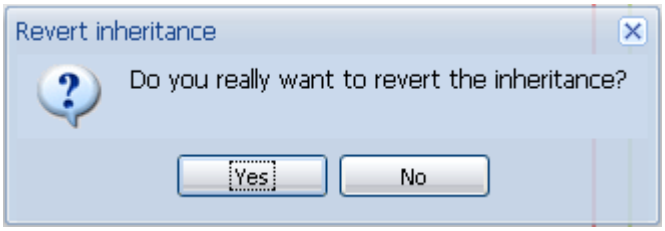


4. After the page has been refreshed, the open lock icon will be displayed.

13.4.4.2.3 Reverting the inheritance of a paragraph

To revert the inheritance of a paragraph:

1. Follow the steps according to the procedure in the section called “Viewing the paragraph status of a Live Copy page”.
2. On the page displaying the status of the appropriate paragraph, click the open lock icon of that paragraph.
3. In the dialog, click **Yes** to revert the inheritance .



4. After the page has been refreshed, the closed lock icon will be displayed.

Copyright 1993-2009 Day Management AG

13.4.5 Managing Blueprints and Live Copies

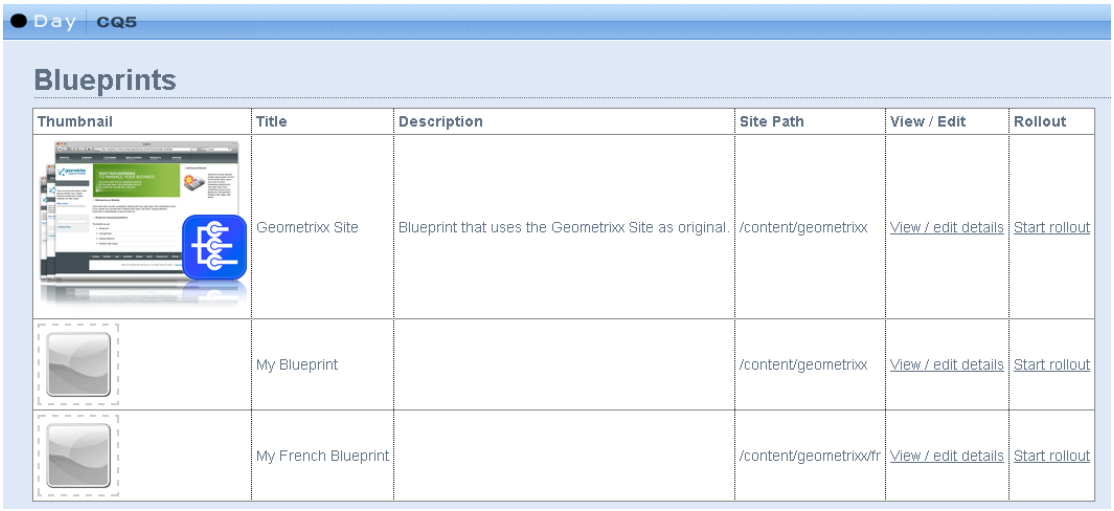
This section describes:

- how to display the list of existing Blueprints
- how to manage a Blueprint and its Live Copies

13.4.5.1 Displaying the list of Blueprints

To display the list of existing Blueprints:

1. Select the **Tools** tab.
2. In the left pane, double-click the **Blueprints** folder.
3. A list of all Blueprints is displayed, with the following parameters:
   - **Thumbnail**
   - **Title**
   - **Description**
   - **Site Path**
   - **View / Edit**: click the link to edit the Blueprint.
   - **Rollout**: click the link to roll out the changes to the Live Copies.

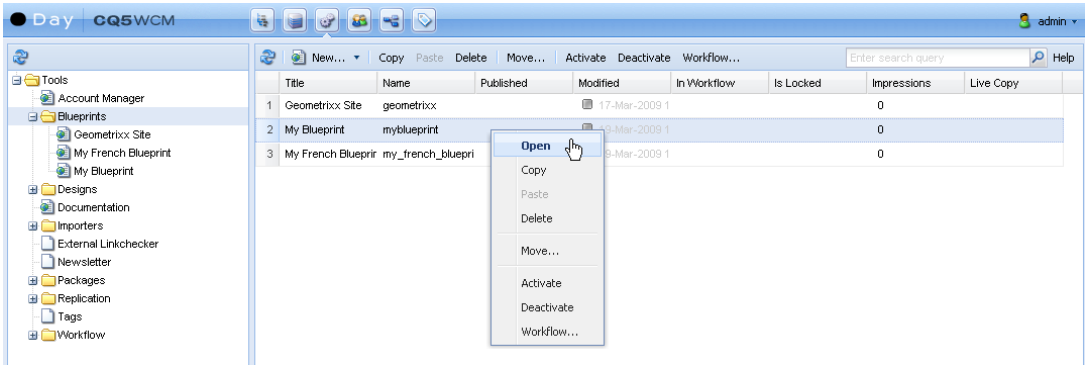


13.4.5.2 Editing a Blueprint

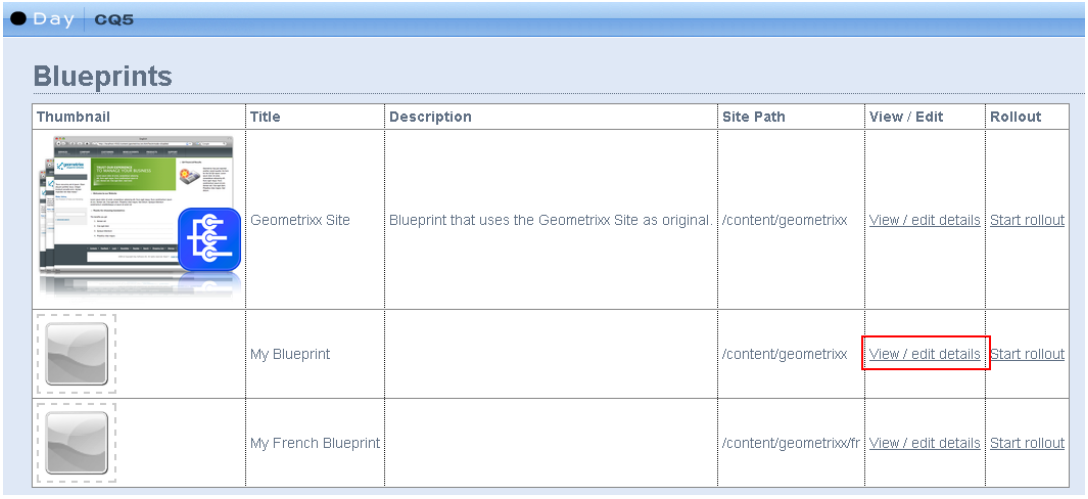
To edit a Blueprint:

1. Open the Blueprint definition page:
   - Either: in the **Tools** tab, in the left pane, select **Blueprints** and open the desired Blueprint definition page.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

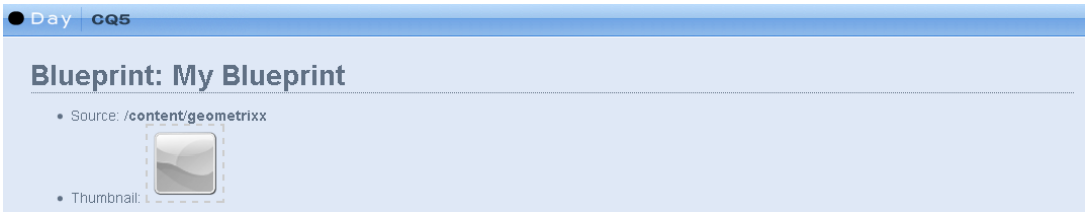


- Or: from the Blueprints list, click the desired link in the **`Status`** column.

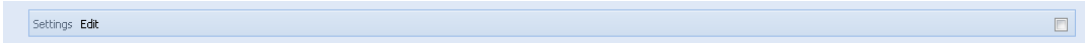

Day CQ5
Blueprints
Thumbnail Title Description Site Path View / Edit Rollout
Geometrixx Site Blueprint that uses the Geometrixx Site as original. /content/geometrixx View / edit details Start rollout
My Blueprint /content/geometrixx View / edit details Start rollout
My French Blueprint /content/geometrixx/fr View / edit details Start rollout

2. The Blueprint definition page is displayed as follows:

- The first part displays the Blueprint settings:

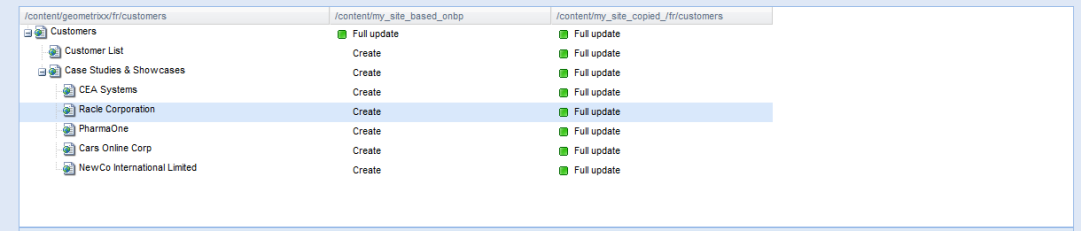


- The second part displays a button to edit the Blueprint settings:

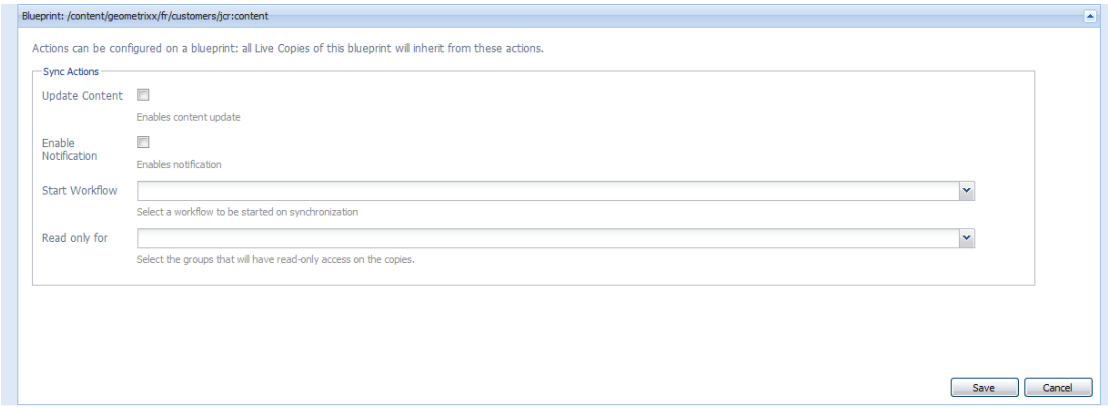


- The last part displays following matrix:
  - The first column displays the Blueprint site which can be expanded by clicking the **+** beside the page.
  - The following columns display the status of the Live Copy pages linked to the Blueprint. Hovering the mouse cursor over the status icon displays a precise description of the status.

Copyright 1993-2009 Day Management AG

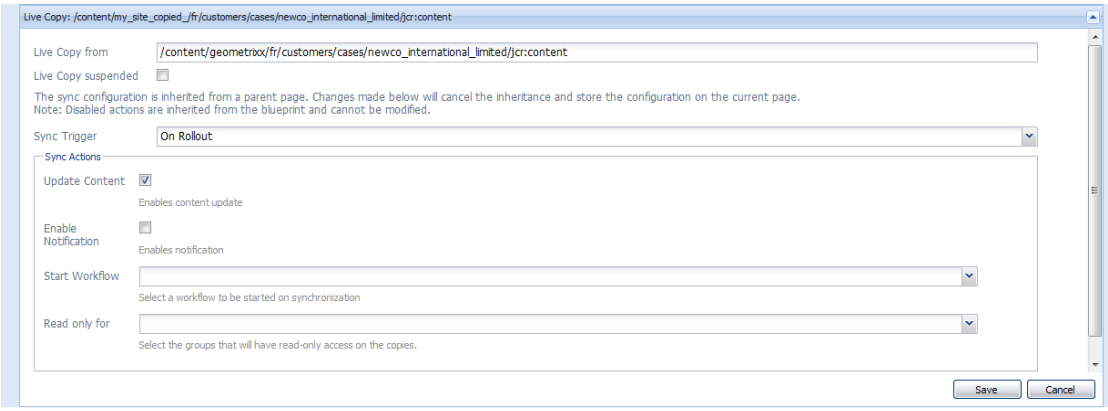


3. Select a Blueprint page from the matrix to edit its properties:


Blueprint: /content/geometrixx/fr/customers/jcr:content
Actions can be configured on a blueprint: all Live Copies of this blueprint will inherit from these actions.
Sync Actions
Update Content
Enables content update
Enable Notification
Enables notification
Start Workflow
Select a workflow to be started on synchronization
Read only for
Select the groups that will have read-only access on the copies.
Save
Cancel

4. Modify the properties. Click **Save** to save the modifications.

5. Select a Live Copy page from the matrix to edit its properties:


Live Copy: /content/my_site_copied_/fr/customers/cases/newco_international_limited/jcr:content
Live Copy from
/content/geometrixx/fr/customers/cases/newco_international_limited/jcr:content
Live Copy suspended
The sync configuration is inherited from a parent page. Changes made below will cancel the inheritance and store the configuration on the current page.
Note: Disabled actions are inherited from the blueprint and cannot be modified.
Sync Trigger
On Rollout
Sync Actions
Update Content
Enables content update
Enable Notification
Enables notification
Start Workflow
Select a workflow to be started on synchronization
Read only for
Select the groups that will have read-only access on the copies.
Save
Cancel

6. Modify the properties. Click **Save** to save the modifications.

13.4.6 Moving Blueprint and/or Live Copy pages

Following behaviors apply when moving Blueprint and/or Live Copy pages:

- When you move a Blueprint root page, you have to reference all the pages of all the Live Copies in the appropriate dialog. The Blueprint root page is moved and all the Live Copy pages remain linked to this Blueprint.
- When you move any other Blueprint page, the page is moved but it is considered deleted on the Blueprint by the Live Copy. The Live Copy page will be deleted on the next rollout.
- When you move a Live Copy root page, the page and all its sub-pages are moved and remain linked to the Blueprint.
- When you move any other Live Copy page, the page is moved. If a version of the page has not been created, the original page will be re-created on the next rollout. Otherwise, the page is considered as deleted.

Copyright 1993-2009 Day Management AG

14 Tools

There are various pages or folders available within the **Tools** tab:

Table 14.1. Functions available within the Tools tab

Page or Folder		DescriptionBlu
Blueprints		Blueprints are used to create as many Live Copies as necessary.
Designs		Holds the list of designs defined, including the graphics and css files to be used.
Form Submissions		Holds the list of form submissions received.
Importers		
	Bulk Editor	Lets you search for items and edit them in bulk. You can also export and import content (in bulk) into the repository.
	Offline Importer	The offline importer enables you to import content from MS Word documents generated offline.
	Feed Importer	Lets you import content from external web sources, which is regularly polls for new and updated content. For example, use the feed importer to import events from other web-based calendars into your CQ WCM calendars.
	Upgrade	Lets you specify the URL of a Communiqué 3 or 4 instance from within a new CQ5 instance. The content and basic functionality will then be upgraded and imported into your new CQ5 installation. The upgrade of customized functionality cannot be guaranteed and must be analyzed individually. For further information see Chapter 4, .
External Link Checker		Scans all content pages within your CQ instance and checks any external links. A list of valid and invalid links displays.
Newsletter		Lets you notify users of newsletter updates or content changes.
Packages		Shows the packages that have been loaded for CQ WCM. Similar to the information shown in CRX's Package Manager.
Replication		
Security		
	Account Manager	Shows account management information, such as the emails sent to reset passwords, and so on.
Tags		Lets you manage tags.
Workflow		

14.1 Bulk Editor

The Bulk Editor lets you search for and edit content from multiple pages simultaneously. In addition, you can export content into the repository using the bulk editor functionality. (Using the Product Listing component, you can also import content into the repository, but this is disabled for the Bulk Editor available in the **Tools** menu.)

This section describes how to work with the bulk editor in the **Tools** menu. Typically, administrators use the bulk editor to search and edit multiple items by populating the table using a GQL query and then by selecting the content items to work on. Users generally use the bulk editor

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

as part of a customized bulk editor application accessible through the product listing component. See product listing. The Bulk Editor allows for very efficient editing when the visual page context is not needed.

The Bulk Editor lets you do the following:

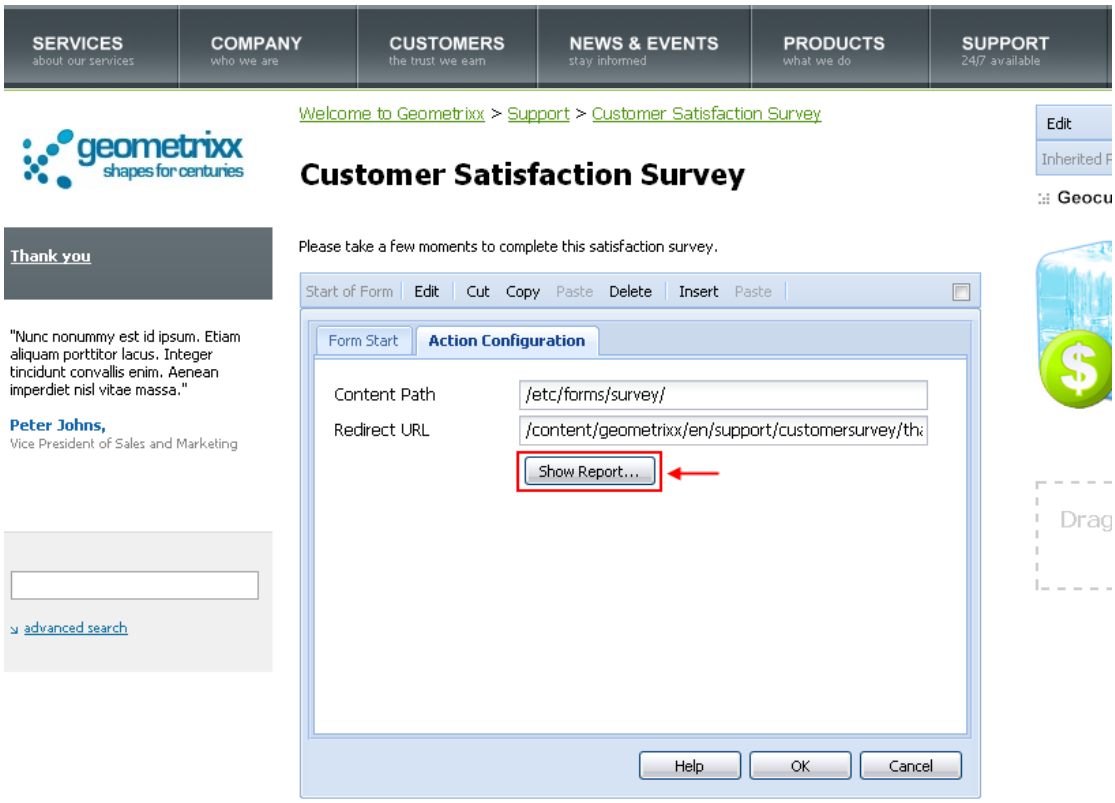
- Search for items using GQL (Google Query Language)
- Make changes to content items directly in the bulk editor to any of those items and save those changes.
- Export the results into a tab-separated (.tsv) spreadsheet file.
- (Product Listing Component only) Import content from a .tsv spreadsheet file.

14.1.1 Example Use Case for the Bulk Editor

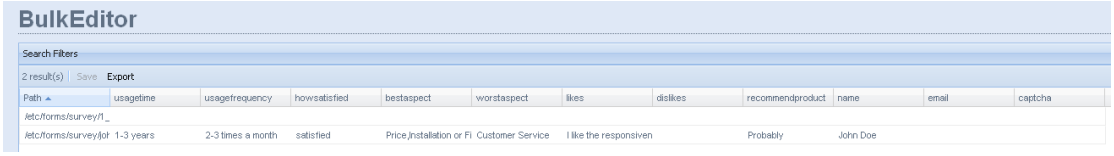
For example, if you need all the names and email addresses of users who filled out a particular survey, the Bulk Editor can provide that information and you can export it into a spreadsheet.

An example of such a use case is included in the Geometrixx web site:

1. Navigate to the **Support** page and then to the **Customer Service Satisfaction** survey.
2. In the **`Start Form`** paragraph, click the **`Action Configuration`** tab and then click **`Show Report`**.



3. In this case, the bulk editor does not allow users to edit the content but only lets them export the information to a spreadsheet. The Bulk Editor is fully customizable.



Copyright 1993-2009 Day Management AG

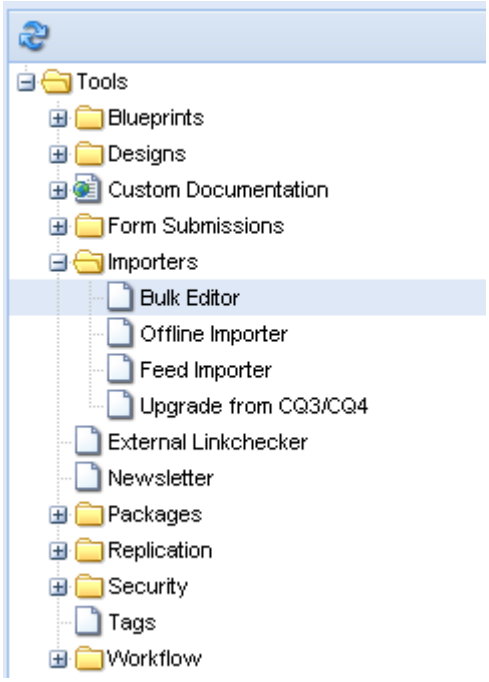
14.1.2 How to Use the Bulk Editor

This section describes how to use the bulk editor and includes procedures for searching for and editing multiple content using the bulk editor, and exporting and importing content from a tab-separated spreadsheet.

14.1.2.1 How to Search For and Edit Multiple Content Using the Bulk Editor

To use the bulk editor to edit multiple items simultaneously:

1. In the **`Tools`** tab, click the **`Importers`** folder to expand it.



2. Double-click the **`Bulk Editor`** to open it.

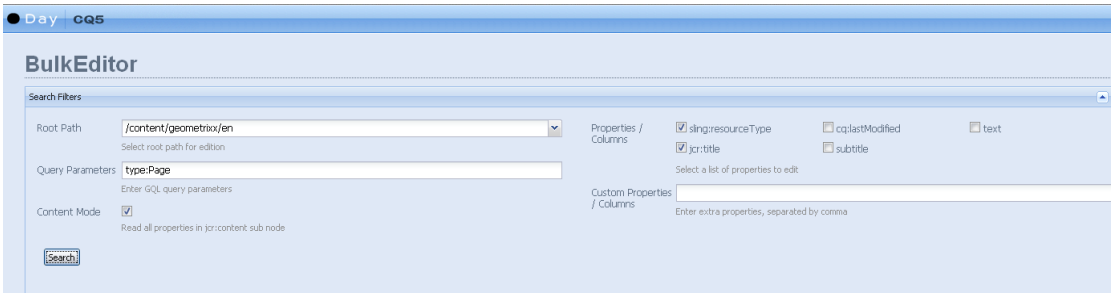


Table 14.2. Bulk Editor Properties

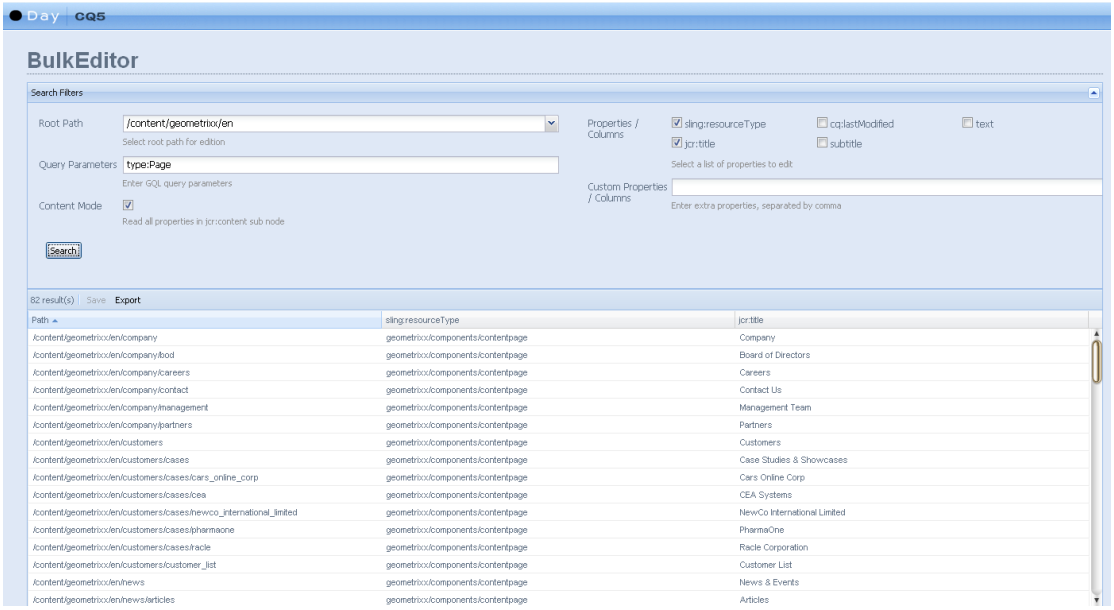
Field	Property
Root Path	Indicates the root path the bulk editor searches. For example, `/content/geometrixx/en`. The bulk editor searches over all child nodes.
Query Parameters	Using GQL parameters, enter the search string you want the bulk editor to look for in the repository; for example, `type:Page` looks for all pages in the root path, `text:professional` looks for all pages that have the word "professional" in them, and `"jcr:title":English` looks for all pages that have "English" as the title. You can only search for strings.
Content Mode check box	

Copyright 1993-2009 Day Management AG

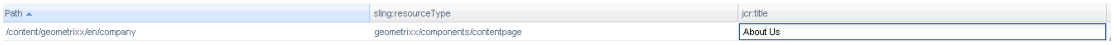
Field	Property
	Select this check box to read properties within the `jcr:content` sub node of the search results if exists. Use for pages only. Property names are prefixed with `"jcr:content/"`
Properties/Columns	Select the check boxes for the properties that you want the bulk editor to return. The properties you select are the column heads in the results pane. By default, the node path is displayed in the results.
Custom Properties/ Columns	Enter any other properties that are not listed in the **`Properties/ Columns`** field. These custom properties appear in the results pane. You can add multiple properties by using a comma to separate properties. **Note:** If you add a custom property that does not yet exist, CQ WCM displays an empty cell. When you modify the empty cell and save it, the property is added to the node. The newly created property must respect node type constraints and property namespaces.

3. Enter information in the fields, as appropriate. See the previous table for more information.

4. Click **`Search`**. The Bulk Editor returns all the pages that meet your search criteria and displays them with the requested columns.



5. Make any changes you would like to directly into any of the columns by double-clicking in the cell.



6. Click **`Save`** to save your changes.

14.1.2.2 How to Export Content

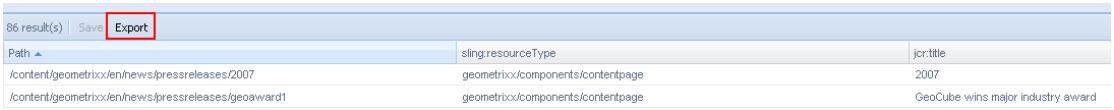
You may need to export content and make changes to it in an Excel spreadsheet. For example, you may want to export a mailing list and change the area code of all the listed phone numbers directly in Excel, add additional lines, and so on.

To export content:

1. Search for content as described in the section called “How to Search For and Edit Multiple Content Using the Bulk Editor”

2. Click **`Export`** to export the changes into a tab-separated Excel spreadsheet. CQ WCM asks you where you want to download the file.

Copyright 1993-2009 Day Management AG



3. Select the location and confirm that you want to download the file.

4. After you download the file, you can open it from your spreasheet program, for example, Microsoft Excel. The spreadsheet program imports the file and converts it to a spreadsheet format.

	A	B	C
1	jcr:path	jcr:content/sling:resourceType	jcr:content/jcr:title
2	/content/geometrixx/en/news/events/dscberlin2008	geometrixx/components/contentpage	DSC 2008 Show in Berlin
3	/content/geometrixx/en/news/events/techsummit	geometrixx/components/contentpage	Partner & Customer TechSummit
4	/content/geometrixx/en/news/webcasts/whatsnew	geometrixx/components/contentpage	What's new in GeoShape?
5	/content/geometrixx/en/news/pressreleases/newcfo	geometrixx/components/contentpage	New CFO appointed
6	/content/geometrixx/en/products/geocube/toolbar/testdrive	geometrixx/components/contentpage	Testdrive
7	/content/geometrixx/en/services/banking	geometrixx/components/contentpage	Banking Services
8	/content/geometrixx/en/news/pressreleases/geoexpands	geometrixx/components/contentpage	Geometrixx expands into new territories
9	/content/geometrixx/en/products/geocube/toolbar	geometrixx/components/contentpage	Toolbar
10	/content/geometrixx/en/company/bod	geometrixx/components/contentpage	Board of Directors

14.1.2.3 How to Import Content

Importing is not available in the Bulk Editor Tool but only through the customized product listing component, which uses the bulk editor as its basis. You can import content from any tab-separated (.tsv) file. In order for importing to work properly, the column headings (first row of cells) must match the column headings of the table you're importing to.

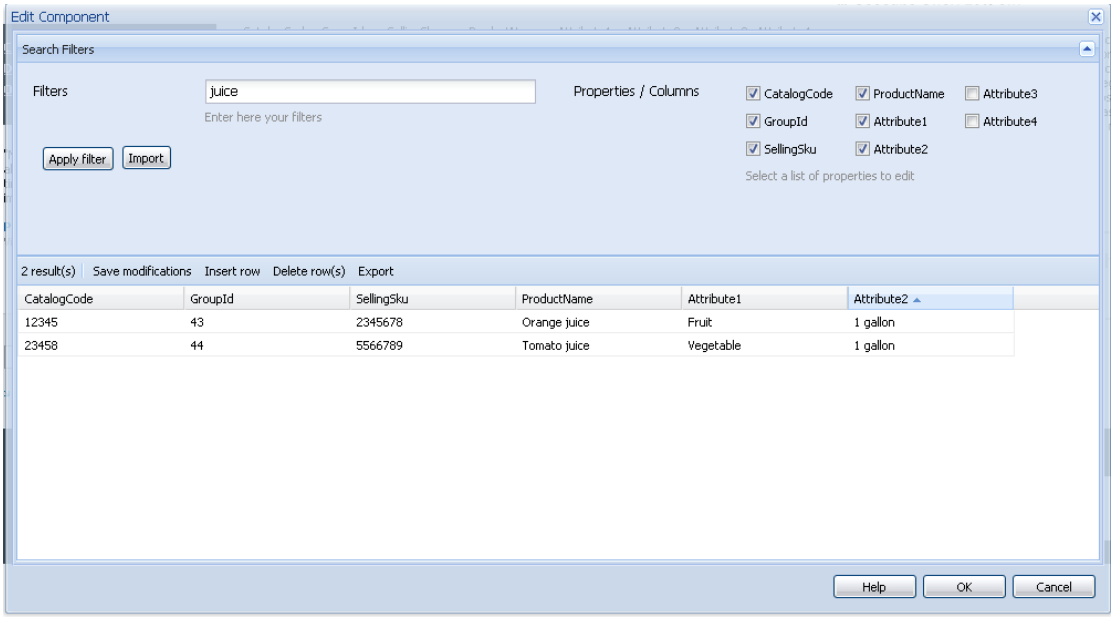
Important

When you re-import content, you erase any previous content for those nodes. Be careful not to overwrite important information.

To import content:

1. Either create a product listing paragraph or open an existing one. The product listing paragraph is not enabled by default. To enable it, see the section called “Developing Components”.

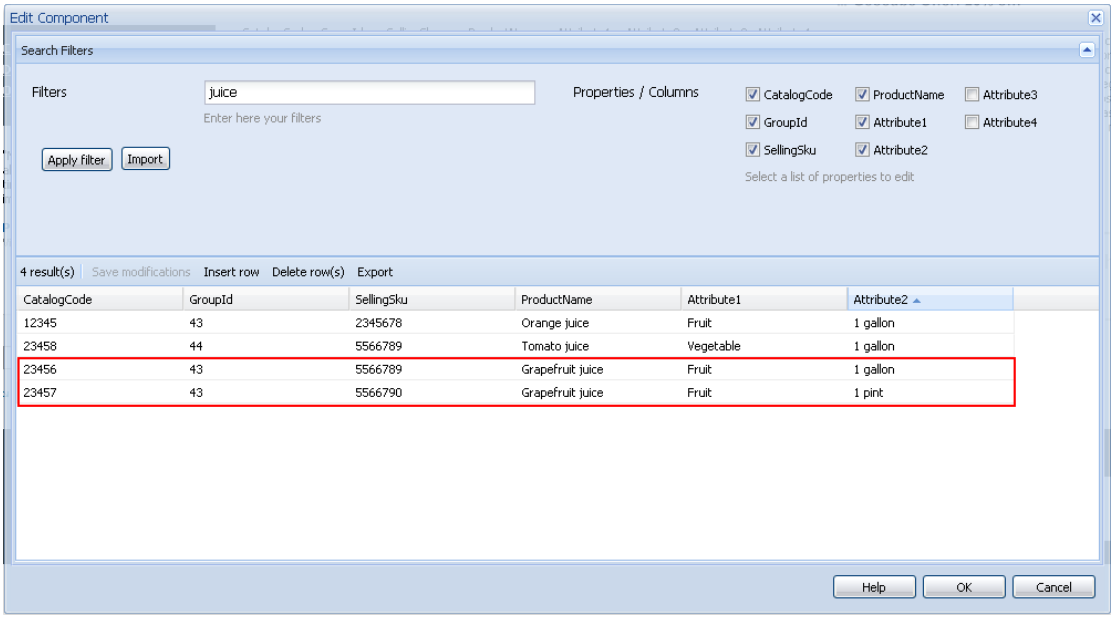
2. In the product listing component, you see the list of existing information.



3. Click **`Import`**.

Copyright 1993-2009 Day Management AG

4. CQ WCM asks you to navigate to the file you want to import. Navigate to the `.tsv` file and click **OK**. The infomation is added to the product listing paragraph.



5. Click **OK** to see the changes listed on the page.

CatalogCode	GroupId	SellingSku	ProductName	Attribute1	Attribute2
12345	43	2345678	Orange juice	Fruit	1 gallon
23456	43	5566789	Grapefruit juice	Fruit	1 gallon
23457	43	5566790	Grapefruit juice	Fruit	1 pint
23458	44	5566789	Tomato juice	Vegetable	1 gallon

14.2 Feed Importer

The feed importer is a framework to repeatedly import content from external sources into your repository. The idea of the feed importer is to poll a remote resource at a specified interval, to parse it, and to create nodes in the content repository that represent the content of the remote resource. In CQ5 WCM, the feed importer is used for the following:

- In the blog to support the autoblogging feature, which automatically creates blog posts from an external RSS or Atom feed. See the section called “Importing RSS Feeds”
- In the calendar for iCalendar subscriptions, which automatically creates calendar events from an external ICS file. See the section called “Importing Events from another Calendar” for further details.

14.3 Offline Importer

14.3.1 How to import documents generated offline

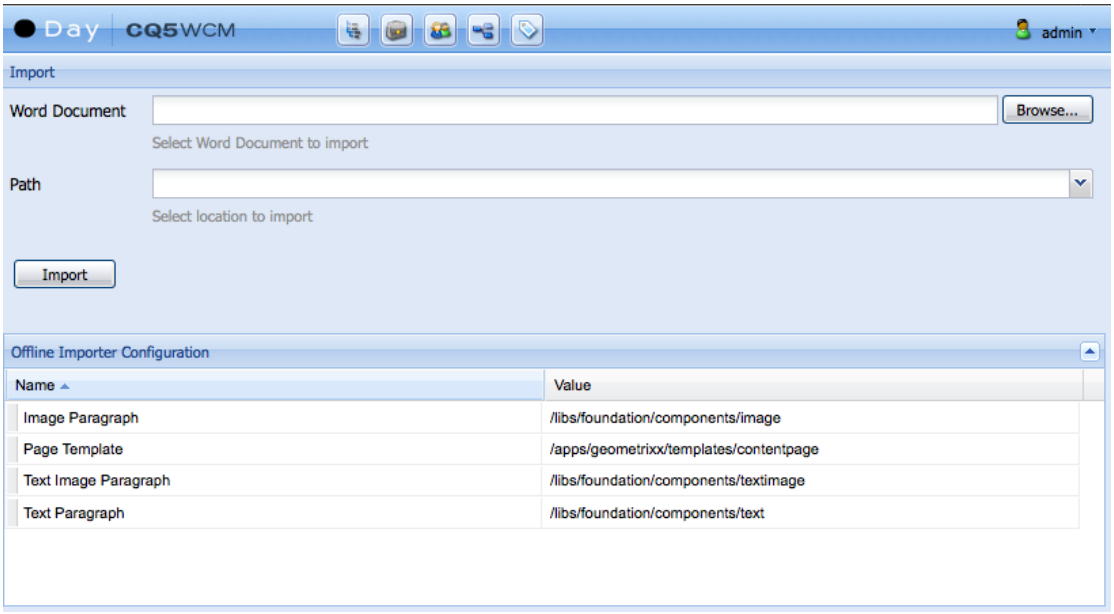
The offline importer allows you to import documents generated offline. Currently documents generated with the following tools are supported:

- Microsoft Word

Copyright 1993-2009 Day Management AG

To import a document use the following steps:

1. Click the **Tools** tab in CQ.
2. Click **Importers** in the left pane to open the folder.
3. Double-click **Offline Importer** in either the left or right pane.The following dialog opens:



4. Use the **Browse...** button to select the **Word Document** you want to import into CQ.
5. Select the site navigator

to select the **Path** to the node at which point this document should be imported.

6. If necessary, you can change the components to be used for the various paragraph definitions. Choose from a list of available components from the drop down lists.
7. Click **Import** to start the import.
8. Return to the wcm/site admin and navigate to the location you specified. Under the specified page you can see the new pages generated from the imported document. You can now edit the content directly within CQ.

14.4 External Link Checker

14.4.1 How to validate external links

An external link checker is provided within CQ. The link checker:

- scans all content pages
- generates a list of all valid and invalid links
- marks invalid links as broken in situ on the individual content pages

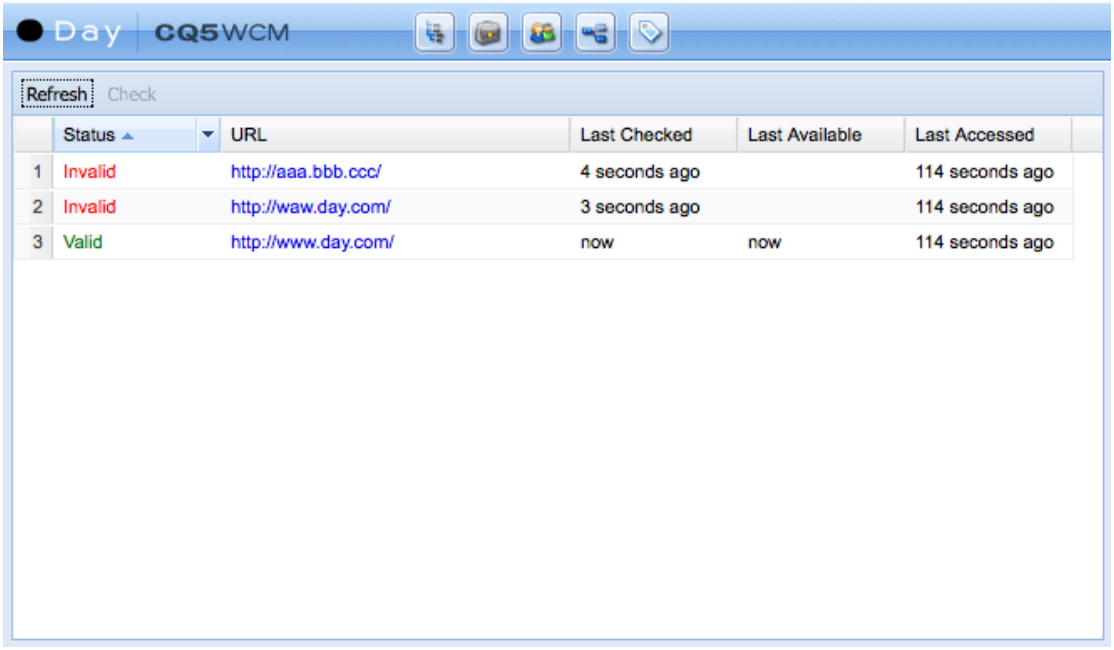
To use the external link checker:

1. Access the **Tools** tab within CQ.

Copyright 1993-2009 Day Management AG

2. **`Double-click`** on **`External Link Checker`** (either the right or left pane). A list of all links is generated.

3. You can highlight a specific link then select **`Check`** for the link to be validated:



Information such as:

- status of the link
- URL
- time since the link was last validated
- time since the link was last available
- time since the link was last accessed

is displayed.

4. On the individual content pages any invalid links will now be shown as broken:

14.5 Newsletter

The Newsletter functionality lets you notify users who have subscribed to specific tags (rather than pages) about updates or content changes to pages with those tags.

For example, a user subscribes to the "product" tag in a newsletter registration form (in Geometrixx, this form is available in the toolbar). When updates are made to a page with the "product" tag, those changes can be sent to all subscribers of that tag via email through the Newsletter tool.

14.5.1 How to Use the Newsletter Functionality

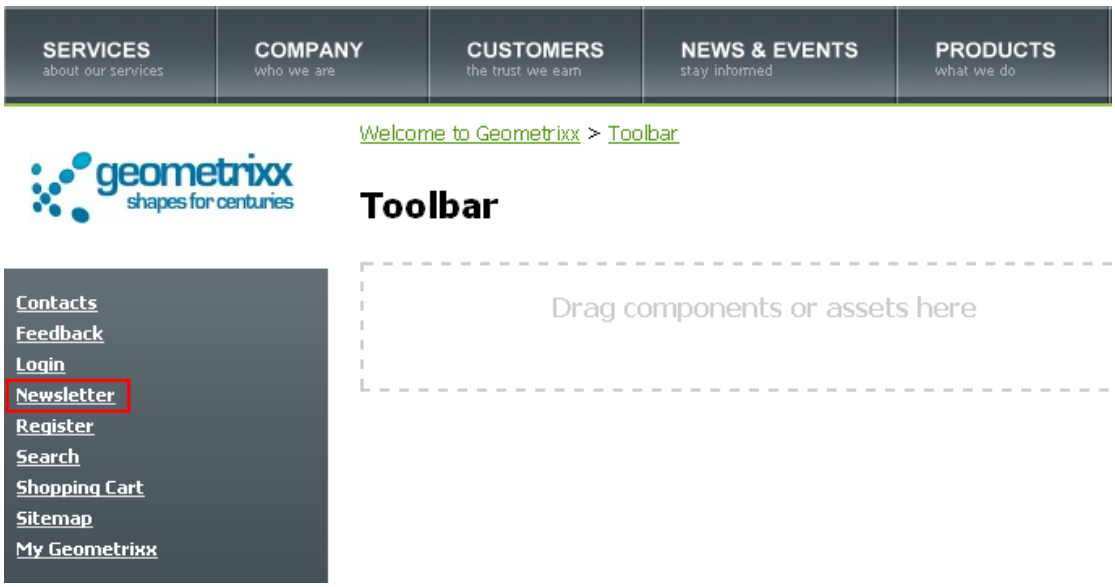
This section describes both how to subscribe and how to push content through the newsletter functionality.

Copyright 1993-2009 Day Management AG

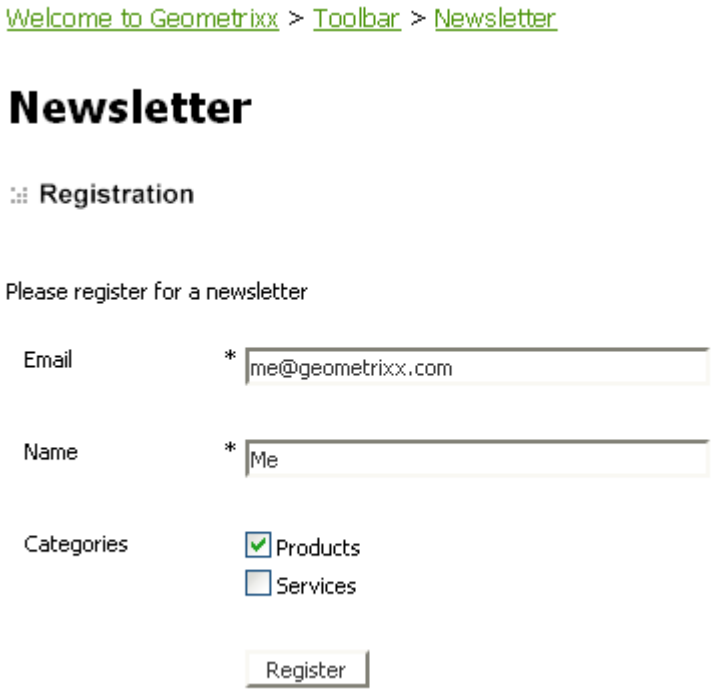
14.5.1.1 Subscribing to a newslettter

To subscribe to a newsletter (using the Geometrixx sample web site as an example):

1. In siteadmin/wcn, navigate to the Geometrixx Toolbar and open it.



2. Click **`Newsletter`**. The newsletter registration opens. Click **`Preview`** mode for ease of use.



3. In the **`Email`** field, enter the email address you want newsletters sent to.
4. In the **`Name`** field, enter your name.
5. In **`Categories`**, select the tags you want to monitor for changes. Anytime a page with the tags you select changes and someone sends a newslettter, you will get notification of those changes.
6. Click **`Register`**. You are now registered to receive updates.

Copyright 1993-2009 Day Management AG

14.5.1.2 Pushing content to subscribers

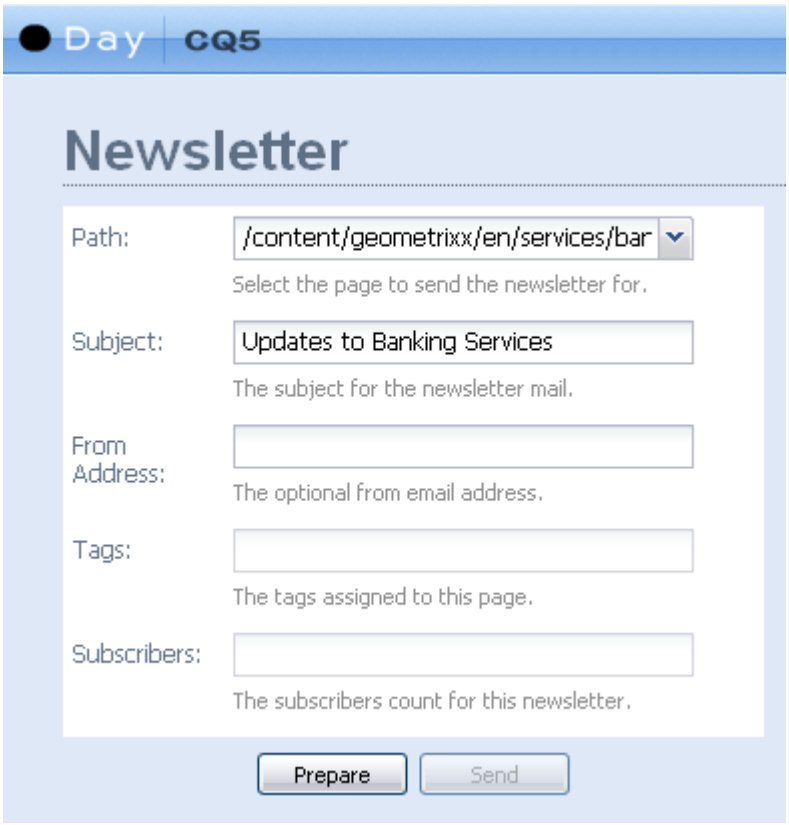
To allow users to subscribe to pages and then send them updated content, follow these steps:

1. Create a newsletter registration form that allows users to subscribe to tags.The sample Geometrixx web site provides such a newsletter form in the Geometrixx toolbar. To create your own newsletter form, see information about creating forms in the Forms documentation. The newsletter uses the tags from the Tag library. To add additional tags, see Chapter 9,

2. Push any changes to pages through the Newsletter functionality in the **Tools** menu. You push updated content to subscribers by navigating to the path of the page that you want to send out. Each page is tagged and when you select a page to be sent out as a newsletter, the distribution list is built from all the people who have subscribed to one of the tags on that page. Anyone subscribed to any of the tags on that page gets the update after you send it.

To send updates to subscribers:

1. In the **Tools** tab, double-click **Newsletter** to open the dialog box.



2. In the **Path** field, navigate to the page that contains the updated information.

3. In the **Subject** field, enter a subject for the mail that is sent to subscribers.

4. Optionally, in the **From Address** field, enter the email address the newsletter is coming from.

5. Click **Prepare**. CQ WCM automatically populates the **Tags** and **Subscribers** fields.

Copyright 1993-2009 Day Management AG

6. Click **Send**. The updates are sent to the subscribers. CQ WCM confirms that it sent the information to the distribution list.

14.6 Security

14.6.1 How to configure automatic emails for account activities

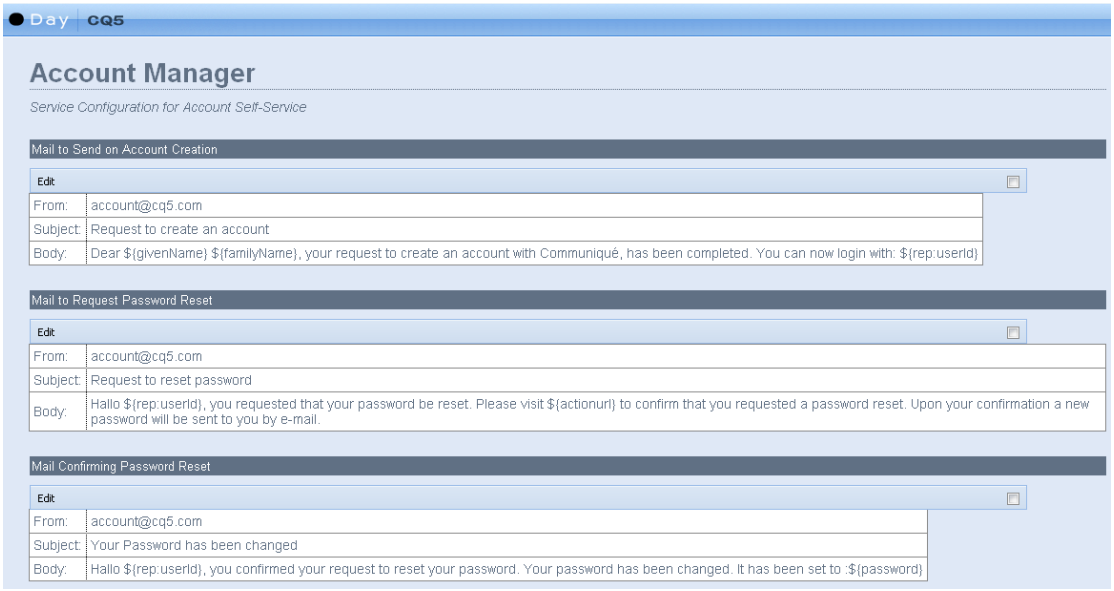
The Account Manager lets you configure what emails users automatically receive when they create an account or reset a password and to confirm a password that has been reset.

To configure automatic emails for account activities:

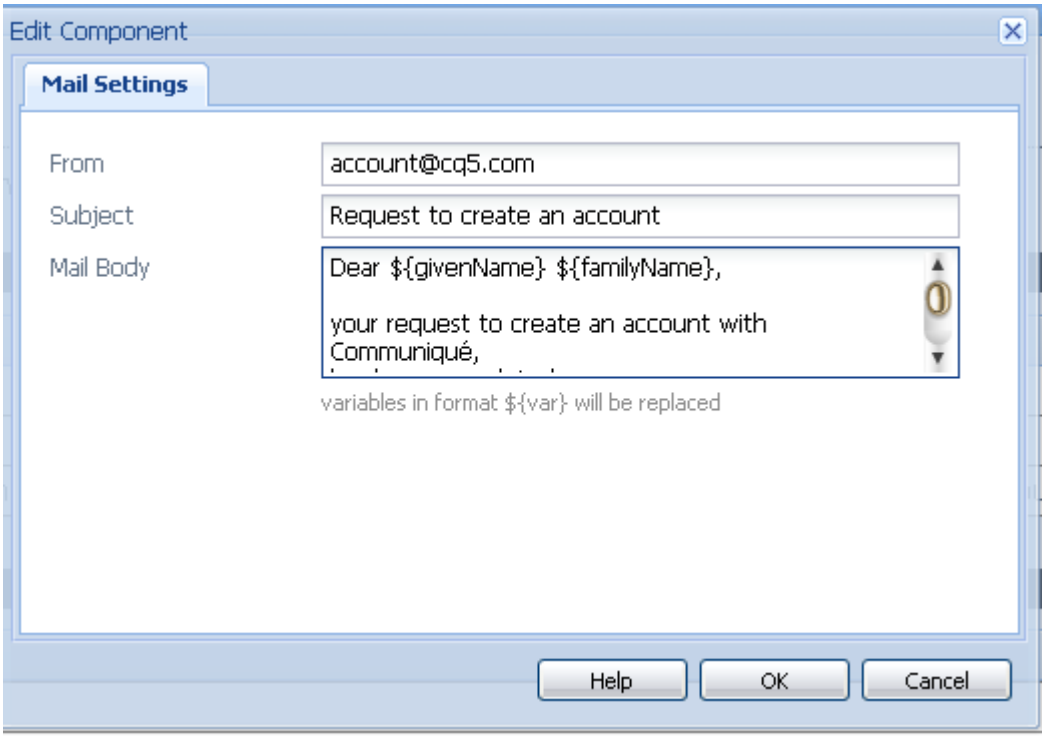
1. In the **`Tools`** tab, click the **`Security`** folder to expand it.

2. Double-click **`Account Manager`** to open the **`Account Manager`** dialog box.

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG


Day CQ5
Account Manager
Service Configuration for Account Self-Service
Mail to Send on Account Creation
Edit
From: account@cq5.com
Subject: Request to create an account
Body: Dear ${givenName} ${familyName}, your request to create an account with Communiqué, has been completed. You can now login with: ${rep:userId}
Mail to Request Password Reset
Edit
From: account@cq5.com
Subject: Request to reset password
Body: Hallo ${rep:userId}, you requested that your password be reset. Please visit ${actionurl} to confirm that you requested a password reset. Upon your confirmation a new password will be sent to you by e-mail.
Mail Confirming Password Reset
Edit
From: account@cq5.com
Subject: Your Password has been changed
Body: Hallo ${rep:userId}, you confirmed your request to reset your password. Your password has been changed. It has been set to :${password}

3. Click **`Edit`** above any of the Mail to ... fields to open the **`Mail Settings`** dialog.



4. Edit the **`From`**, **`Subject`**, and **`Mail Body`** fields, as appropriate and click **`OK`**. CQ WCM saves your settings.

14.7 Replication

Replication agents are central to CQ as the mechanism used to:

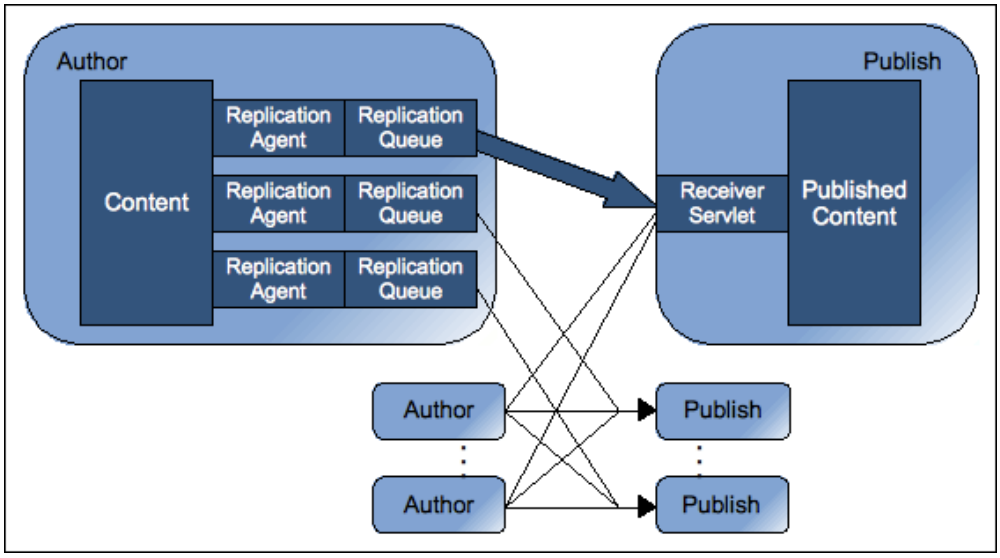
- Publish (activate) content from an author to a publish environment (see the section called “Author and Publish Environments” for an overview and the section called “How To Publish Pages” for how this is used from the siteadmin).
- Explicitly flush content from the Dispatcher cache.
- Return user input (for example, form input) from the publish environment to the author environment (under control of the author environment).

Copyright 1993-2009 Day Management AG

14.7.1 Replicating from Author to Publish

Replication, to a publish instance or dispatcher, takes place in several steps:

- the author requests that certain content be published (activated); this can be initiated by a manual request, or by automatic triggers which have been preconfigured.
- the request is passed to the appropriate default replication agent; an environment can have several default agents which will always be selected for such actions.
- the replication agent “packages” the content and places it in the replication queue.
- in wcm/siteadmin the colored status indicator is set for the individual pages (see the section called “Determining Page Publication Status”).
- the content is lifted from the queue and transported to the publish environment using the configured protocol; usually this is HTTP.
- a servlet in the publish environment receives the request and publishes the received content.



14.7.2 Replicating from Publish to Author

For features such as forms, where users can enter information on a publish instance, a form of replication is also needed to return this information to the author environment, from where it is redistributed to other publish environments. However, due to security considerations, any traffic from the publish to the author environment must be strictly controlled.

This is known as *reverse replication* and functions using an agent in the publish environment which references the author environment. This agent places the input into an outbox. This outbox is matched with replication listeners in the author environment. The listeners poll the outboxes to collect any input made and then distribute it as necessary. This ensures that the author environment controls all traffic.

14.7.3 How to configure your Replication Agents

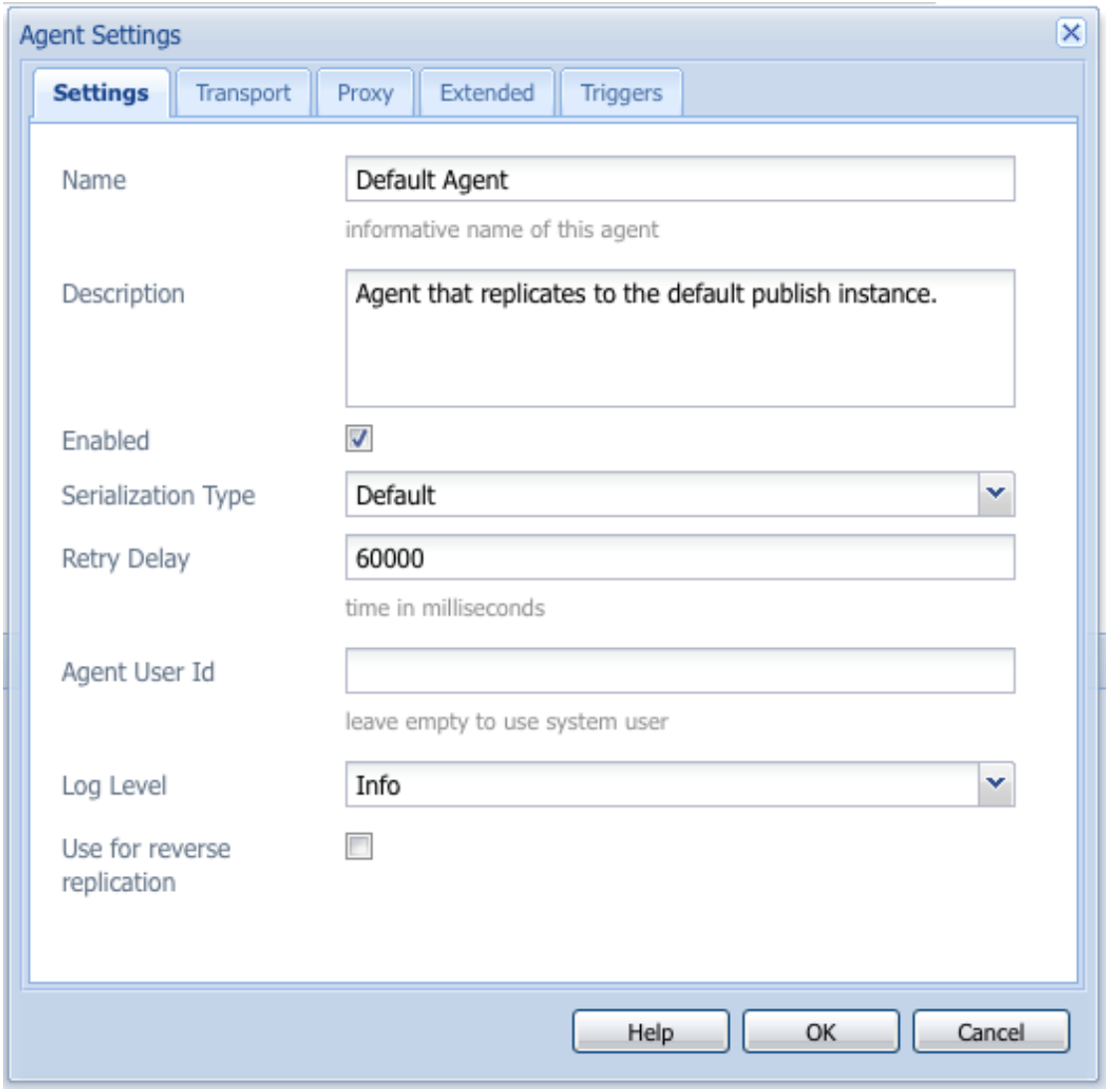
14.7.3.1 Configuring your Replication Agents from wcm/siteadmin

From siteadmin in the author environment you can configure replication agents that reside in either the author environment (**`Agents on author`**) or the publish environment (**`Agents on publish`**). The following procedures illustrate the configuration of an agent in the author environment, but can be used for both.

To configure a replication agent from siteadmin:

Copyright 1993-2009 Day Management AG

1. Access the **Tools** tab in CQ.
2. Click **Replication** (left pane to open the folder).
3. Double-click **Agents on author** (either the left or the right pane).
4. Click the appropriate agent name (which is a link) to show detailed information on that agent.
5. Click **Edit** to open the configuration dialog:



6. The values provided should be sufficient for a default installation. If you make changes then click **OK** to save them (see the section called “Replication Agents - Configuration Parameters” for more details of the individual parameters).

14.7.3.2 Configuring your Replication Agents from the CRX Explorer

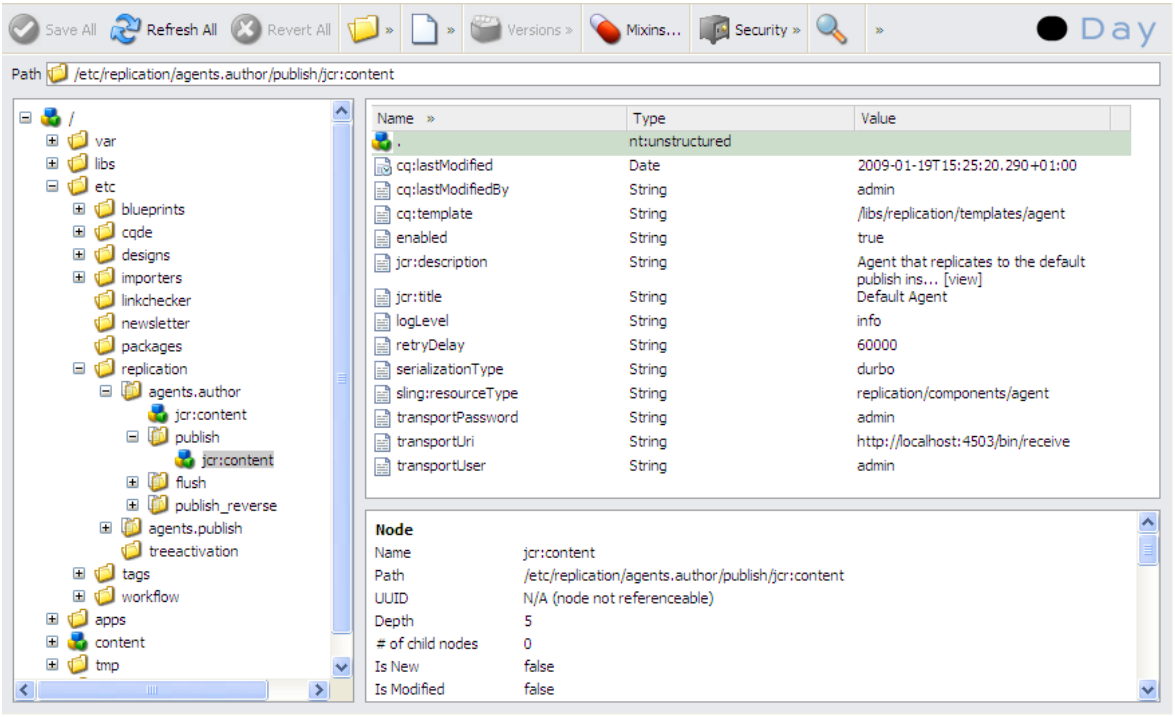
Various parameters of your replication agents can be configured using the CRX Explorer.

If you navigate to /etc/replication you can see the following three nodes:

- agents.author
- agents.publish
- treeactivation

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG

The two agents hold configuration information about the appropriate environment, and are only active when that environment is running. For example, `agents.publish` will only be used in the publish environment. The following screenshot shows the publish agent in the author environment, as included with CQ WCM:



14.7.3.3 Configuring Reverse Replication

Reverse replication is used to get user content generated on a publish instance back to an author instance. This is commonly used for moderated forums, blogs, surveys and registration forms, amongst others.

For security reasons, most network topologies do not allow connections *from* the “Demilitarized Zone” (a subnetwork that exposes the external services to an untrusted network such as the Internet).

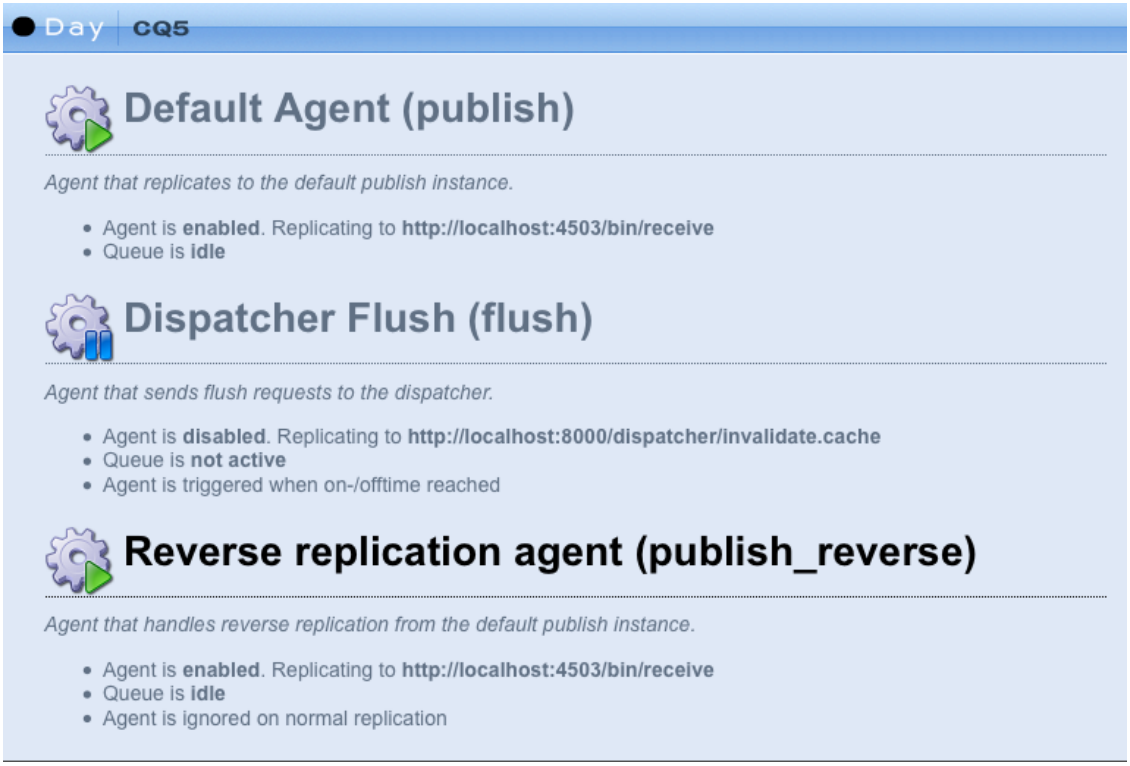
As the publish environment is usually in the DMZ, to get content back to the author environment the connection must be initiated from the author instance. This is done with:

- an *outbox* in the publish environment where the content is placed.
- an agent (publish) in the author environment which periodically polls the outbox for new content.

To do this you need:

A reverse replication agent in the author environment
: This acts as the active component to collect information from the outbox in the publish environment:

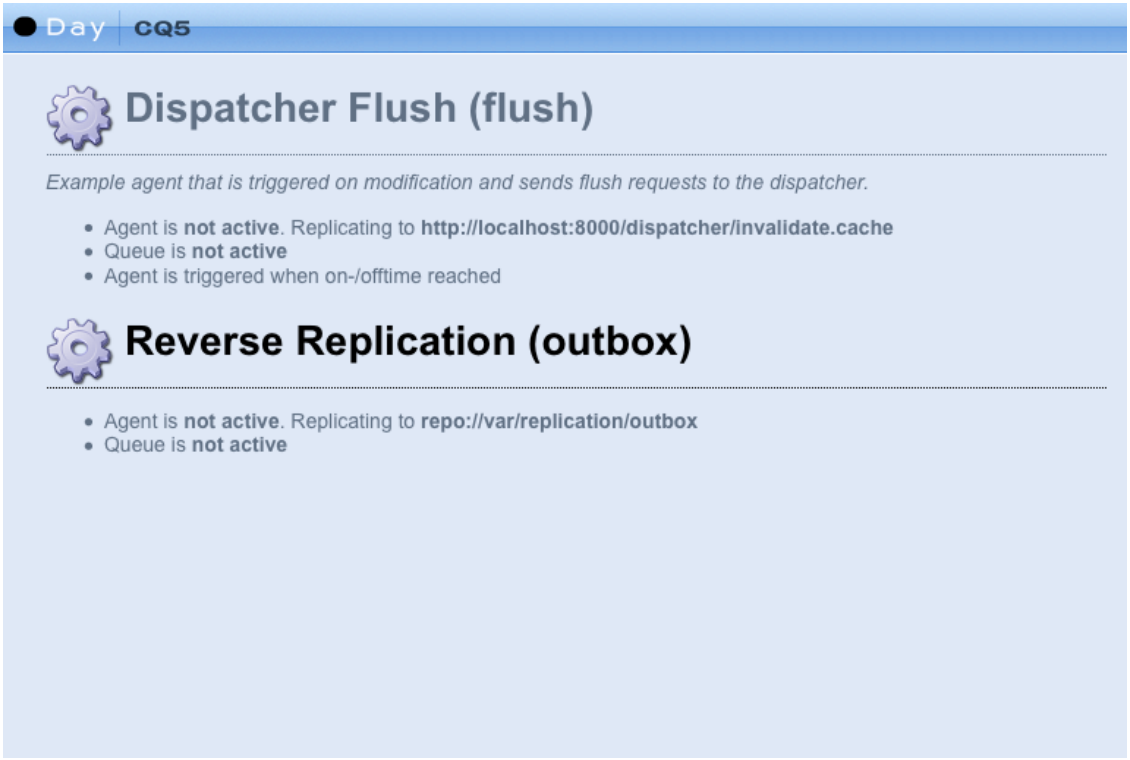
Copyright 1993-2009 Day Management AG


Day CQ5
Default Agent (publish)
Agent that replicates to the default publish instance.
Agent is enabled. Replicating to http://localhost:4503/bin/receive
Queue is idle
Dispatcher Flush (flush)
Agent that sends flush requests to the dispatcher.
Agent is disabled. Replicating to http://localhost:8000/dispatcher/invalidate.cache
Queue is not active
Agent is triggered when on-/offtime reached
Reverse replication agent (publish_reverse)
Agent that handles reverse replication from the default publish instance.
Agent is enabled. Replicating to http://localhost:4503/bin/receive
Queue is idle
Agent is ignored on normal replication

If you want to use reverse replication then ensure that this agent is activated.

A reverse replication agent in the publish environment (an outbox)

This is the passive element as it acts as an “outbox.” User input is placed here, from where it is collected by the agent in the author environment.


Day CQ5
Dispatcher Flush (flush)
Example agent that is triggered on modification and sends flush requests to the dispatcher.
Agent is not active. Replicating to http://localhost:8000/dispatcher/invalidate.cache
Queue is not active
Agent is triggered when on-/offtime reached
Reverse Replication (outbox)
Agent is not active. Replicating to repo://var/replication/outbox
Queue is not active

Copyright 1993-2009 Day Management AG

14.7.3.4 Configuring Replication for Multiple Publish Instances

Upon installation a default agent is already configured for replication to a publish instance running on port 4503 of the localhost.

To configure replication for an additional publish instance you need to create, and configure, a new replication agent:

1. Log in to the site administration of CQ5 on the author instance.
2. Open the Tools tab; for example, at `http://localhost:4502/libs/wcm/content/misc.html`.
3. Select **`Replication`**, then **`Agents on author`** in the left panel.
4. Select **`New...`**.
5. Set the **`Title`** and **`Name`**, then select **`Replication Agent`**.
6. Click **`Create`** to create the new agent.
7. Double-click the new agent item to open the configuration panel.
8. Click **`Edit`** - the **`Agent Settings`** dialog will open - the **`Serialization Type`** is already defined as *`Default`*, this must remain so.
    a. In the **`Settings`** tab:
        i. Activate **`Enabled`**.
        ii. Enter a **`Description`**.
        iii. Set the **`Retry Delay`** to *`60000`*.
        iv. Leave the **`Serialization Type`** as *`Default`*.
    b. In the **`Transport`** tab:
        - Enter the required URI for the new publish instance; for example, `http://localhost:4504/bin/receive`.

    You can configure other parameters as required.
9. Click **`OK`** to save the settings.

Tip

You can then test operation by updating, then publishing, a page in the author environment.

The updates will appear on all publish instances that have been configured as above.

If you encounter any problems, you can check the logs on the author instance. Depending on the level of detail required you can also set the **`Log Level`** to *`Debug`*. using the **`Agent Settings`** dialog as above.

14.7.3.5 Configuring a Dispatcher Flush agent

Default agents are included with the installation. However, certain configuration is still needed and the same applies if you are defining a new agent:

1. Log in to the site administration of CQ5 on the author instance.

Copyright 1993-2009 Day Management AG

2. Open the Tools tab; for example, at `http://localhost:4502/libs/wcm/content/misc.html`.
3. Select **`Replication`**, then **`Agents on publish`** in the left panel.
4. **`Double-click`** on the **`Dispatcher Flush`** item to open the overview.
5. Click Edit - the **`Agent Settings`** dialog will open:
   a. In the **`Settings`** tab:
      i. Activate **`Enabled`**.
      ii. Enter a **`Description`**.
      iii. Leave the **`Serialization Type`** as *`Dispatcher Flush`*, or set it as such if creating a new agent.
   b. In the **`Transport`** tab:
      - Enter the required URI for the new publish instance; for example, `http://localhost:80/dispatcher/invalidate.cache`.

   You can configure other parameters as required.
6. Click **`OK`** to save the changes.
7. Return to the **`Tools`** tab, from here you can **`Activate`** the **`Dispatcher Flush`** agent (**`Agents on publish`**).

Note

The **`Dispatcher Flush`** replication agent is not active on author. You can access the same page in the publish environment by using the equivalent URI; for example, `http://localhost:4503/etc/replication/agents.publish/flush.html`.

14.7.4 Replication Agents - Configuration Parameters

When configuring a replication agent four tabs are available within the dialog:

14.7.4.1 Settings

Name
: A unique name for the replication agent.

Description
: A description of the purpose this replication agent will serve.

Enabled
: Indicates whether the replication agent is currently enabled.

Serialization Type
: The type of serialization:

  - Default: Set if the agent is to be automatically selected.
  - Dispatcher Flush: Select this if the agent is to be used for flushing the dispatcher cache.

Retry Delay
: The delay (waiting time in milliseconds) between two retries, should a problem be encountered.

  Default: `60000`

Copyright 1993-2009 Day Management AG

Agent User Id
: The agent will use this user account to collect and package the content from the author environment.

  Leave this field empty to use the system user account (the account defined in sling as the “administrator user”; by default this is “`admin`”).

  Important

  This account *must* have read access to all paths which will be replicated.

Log Level
: Specifies the level of detail to be used for log messages.

  - Error - only errors will be logged
  - Info - errors, warnings and other informational messages will be logged
  - Debug - a high level of detail will be used in the messages, primarily for debug purposes

  Default: `Info`

Use for reverse replication
: Indicates whether this agent will be used for reverse replication; returns user input from the publish to author environment.

14.7.4.2 Transport

URI
: This specifies the receiving servlet at the target location. In particular, you can specify the hostname (or alias) and context path to the target instance here.

  For example:

  - A Default Agent may replicate to `http://localhost:4503/bin/receive`
  - A Dispatcher Flush agent may replicate to `http://localhost:8000/dispatcher/invalidate.cache`

  The protocol specified here (HTTP or HTTPS) will determine the transport method.

User
: User name of the account to be used for accessing the target.

Password
: Password for the account to be used for accessing the target.

NTLM Domain
: Domain for NTML authentication.

NTLM Host
: Host for NTML authentication.

Enable relaxed SSL
: Enable if you want self-certified SSL certificates to be accepted.

Allow expired certs
: Enable if you want expired SSL certificates to be accepted.

14.7.4.3 Proxy

The following settings are only needed if a proxy is needed.

Proxy Host
: Hostname of the proxy used for transport.

Copyright 1993-2009 Day Management AG

Proxy Port
: Port of the proxy.

Proxy User
: User name of the account to be used.

Proxy Password
: Password of the account to be used.

Proxy NTLM Domain
: The proxy NTLM domain.

Proxy NTLM Host
: The proxy NTLM host.

14.7.4.4 Extended

Interface
: Socket interface to bind to.

HTTP Method
: HTTP method to use.

HTTP Headers
: These are used for Dispatcher Flush agents and specify elements that must be flushed.

  {action} indicates a replication action; {path} indicates a path.

Connect Timeout
: Timeout (in milliseconds) to be applied when trying to establish a connection.

Socket Timeout
: Timeout (in milliseconds) to be applied when waiting for traffic after a connection has been established.

Protocol Version
: Version of the protocol; for example “1.0” for HTTP/1.0.

14.7.4.5 Triggers

These settings are used to define triggers for automated replication:

Ignore default
: If checked, the agent is excluded from default replication; this means it will not be used if a content author issues a replication action.

On Modification
: Here a replication by this agent will be automatically triggered when a page is modified. This is mainly used for Dispatcher Flush agents, but also for reverse replication.

On-/Offtime reached
: This will trigger automatic replication (to activate or deactivate a page as appropriate) when the ontimes or offtimes defined for a page occur. This is primarily used for Dispatcher Flush agents.

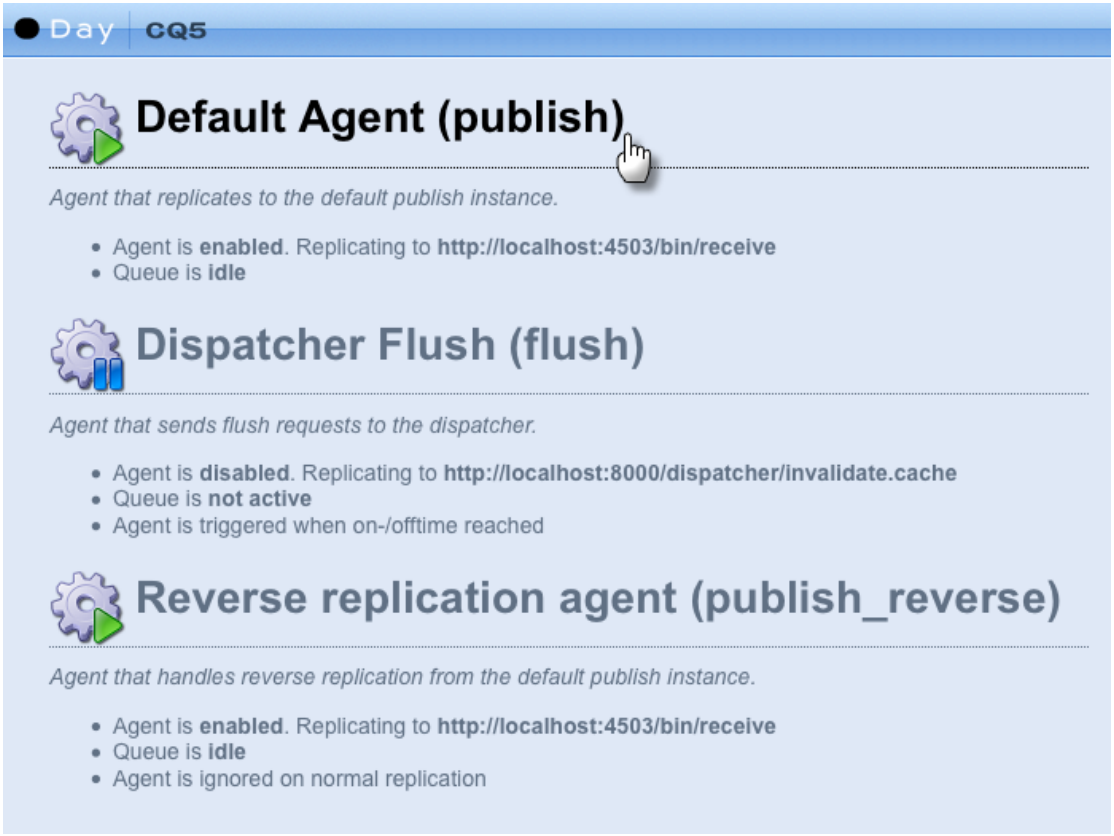
14.7.5 How to monitor your Replication Agents

To monitor a replication agent:

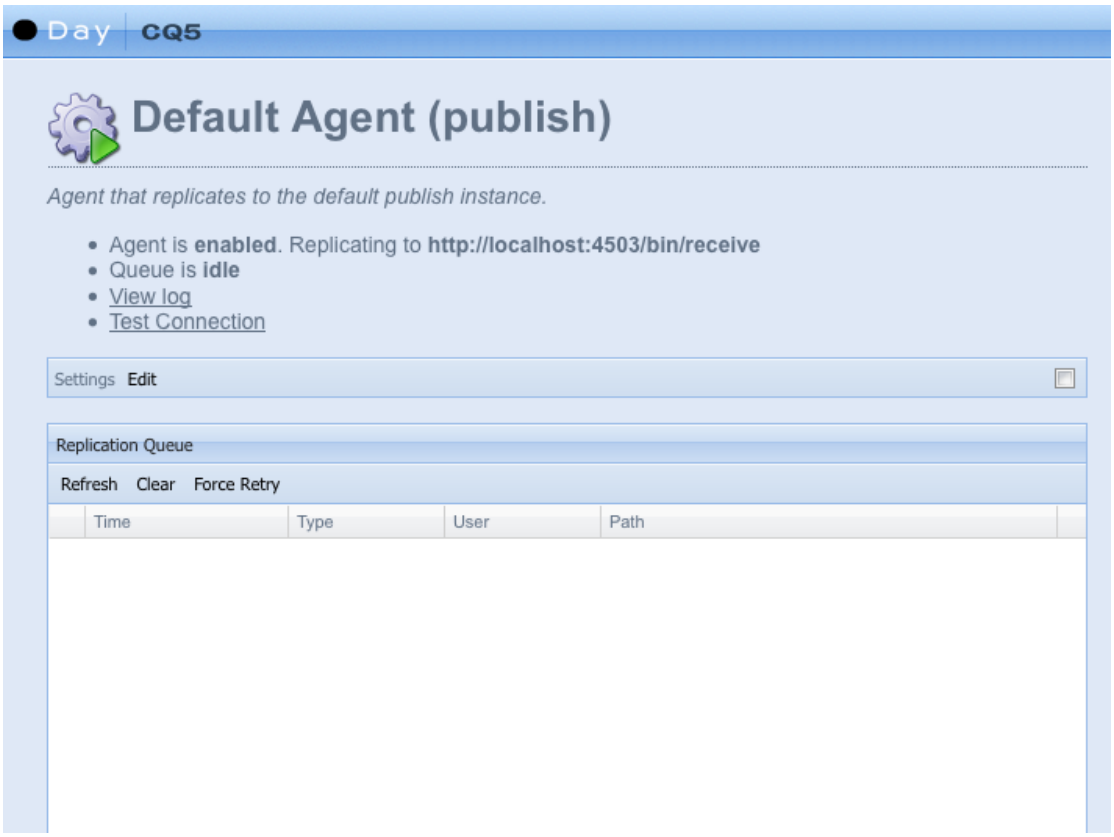
1. Access the **`Tools`** tab in CQ.
2. Click **`Replication`**.

Copyright 1993-2009 Day Management AG

3. Double-click the link to agents for the appropriate environment (either the left or the right pane); for example **`Agents on author`**.The resulting window shows an overview of all your replication agents for the author environment, including their target and status:


Day CQ5
Default Agent (publish)
Agent that replicates to the default publish instance.
Agent is enabled. Replicating to http://localhost:4503/bin/receive
Queue is idle
Dispatcher Flush (flush)
Agent that sends flush requests to the dispatcher.
Agent is disabled. Replicating to http://localhost:8000/dispatcher/invalidate.cache
Queue is not active
Agent is triggered when on-/offtime reached
Reverse replication agent (publish_reverse)
Agent that handles reverse replication from the default publish instance.
Agent is enabled. Replicating to http://localhost:4503/bin/receive
Queue is idle
Agent is ignored on normal replication

4. Click the appropriate agent name (which is a link) to show detailed information on that agent:



Copyright 1993-2009 Day Management AG

Here you can:

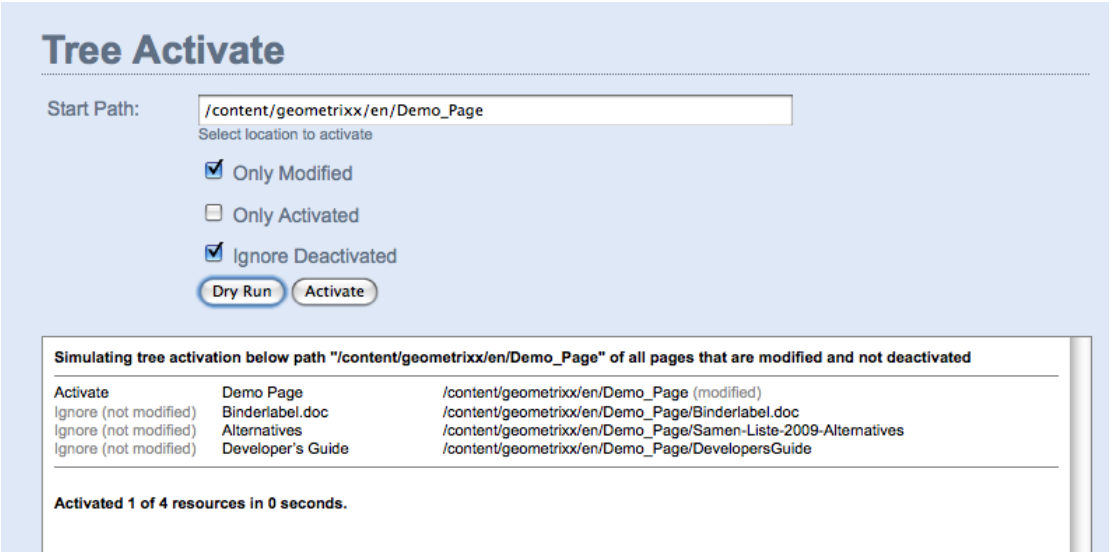
- See whether the agent is enabled.
- See the target of any replications.
- See whether the replication queue is currently active, and if so any items in the queue.
- **`View Log`** to access the log of any actions by the replication agent.
- **`Test Connection`** to the target instance.
- **`Refresh`** or **`Clear`** the display of queue entries.
- **`Force Retry`** on any queue items if required.

14.7.6 How to activate a complete section (tree) of your website

From wcm/siteadmin you can activate the individual pages. When you have entered, or updated, a considerable number of content pages - all of which are resident under the same root page - it can be easier to activate the entire tree in one action. You can also perform a Dry Run to emulate an activation and highlight which pages would be activated.

To activate a complete tree of your website:

1. Access the **`Tools`** tab in CQ.
2. Click on **`Replication`** - the folder will expand.
3. Then double-click on **`Activate Tree`**.
4. The following dialog screen will be shown:


Tree Activate
Start Path:
/content/geometrixx/en/Demo_Page
Select location to activate
Only Modified
Only Activated
Ignore Deactivated
Dry Run
Activate
Simulating tree activation below path "/content/geometrixx/en/Demo_Page" of all pages that are modified and not deactivated
Activate Demo Page /content/geometrixx/en/Demo_Page (modified)
Ignore (not modified) Binderlabel.doc /content/geometrixx/en/Demo_Page/Binderlabel.doc
Ignore (not modified) Alternatives /content/geometrixx/en/Demo_Page/Samen-Liste-2009-Alternatives
Ignore (not modified) Developer's Guide /content/geometrixx/en/Demo_Page/DevelopersGuide
Activated 1 of 4 resources in 0 seconds.

5. Enter the **`Start Path`**. This specifies the path to the root of the section you want to activate (publish). This page, and all pages underneath, will be considered for activation (or used in the emulation if a Dry Run is selected).
6. Activate the selection criteria as required:
   - **`Only Modified`**: only activate pages that have been modified.
   - **`Only Activated`**: only activate pages that have (already) been activated. Acts as a form of reactivation.

Copyright 1993-2009 Day Management AG

- **`Ignore Deactivated`**: ignore any pages which have been deactivated.

7. Select the action you want to perform:

   a. Select **`Dry Run`** if you want to check which pages *would* be activated. This is only an emulation, no pages will be activated.

   b. Select **`Activate`** if you want to activate the pages.

Copyright 1993-2009 Day Management AG

Appendix A. Keyboard Shortcuts

Table A.1. Keyboard Shortcuts

Location	Shortcut	Description
Page with a teaser component.	**`Ctrl-Alt-c`**	Shows the clickstream cloud: collection of page tags related to clicks that the user has made and used to focus the teaser.
Content Finder - Search box	**`down-arrow`**	Trigger a suggestions list. Needed when too few characters have been entered to trigger the list automatically (this happens when 2 or more characters have been entered).
	`right-arrow` (on a suggested path)	Select item and trigger suggestions for the selected path.
	`left-arrow` (on a suggested path)	Select item and trigger suggestions for its ancestors (as in siblings of parent).
	`Enter` (on a suggested path)	Select item and trigger search.
	`Esc`	Close suggestions layer.
Drag assets, drop on destination	**`Alt+drag`**	The drop action produces a new paragraph; instead of replacing the asset in the destination.
Content Window (Edit Mode) - Paragraphs	**`Shift-Click`**	Select multiple paragraphs.
	`Ctrl-Click`	Select multiple paragraphs.
	`Ctrl-C`	Copy selected paragraph(s).
	`Ctrl-X`	Cut selected paragraph(s). **Note:** *The cut paragraph will not disappear until it has been pasted to the new location.*
	`Ctrl-V`	Paste paragraphs from clipboard.
	`Alt-Ctrl-V`	Paste as reference.
	`Del`	Delete selected paragraph(s).
	`Backspace`	Delete selected paragraph(s).
	`Alt-right-click`	Force default (browser) context menu.

Copyright 1993-2009 Day Management AG

Appendix B. Security Checklist

This section deals with various steps you should take to ensure that your CQ5 installation is secure.

B.1 Change Default Passwords

Day strongly recommends that you change the passwords for the following (privileged) `admin` accounts (on all instances) after installation:

1. The **`CQ`** `admin` account.

   Important

   The CQ admin account and the CRX admin accounts are actually one and the same. So once you have changed the password for the “CQ admin” account, you will need to use the new password when accessing CRX.

   Important

   To change the password for the CQ / CRX `admin` account, you need to make changes in **both** CRX and the OSGi Console. See the section called “Changing the CQ admin password in the CRX console” and the section called “Changing the CQ admin password in the OSGi Apache Felix console”.

2. The **`CQSE`** (Communiqué Servlet Engine) `admin` account.

3. The **`Apache Felix Web Management Console`** `admin` password.

Note

Further actions are described in the table the section called “Default Users and Groups”, which gives an overview of the default users and groups included in the standard installation.

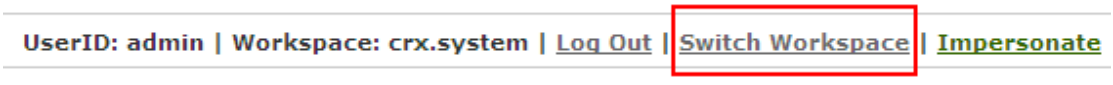
B.1.1 Changing the CQ admin password

To change the password for the CQ `admin` account, you need to make changes in **both** CRX and the OSGi Console.

B.1.1.1 Changing the CQ admin password in the CRX console

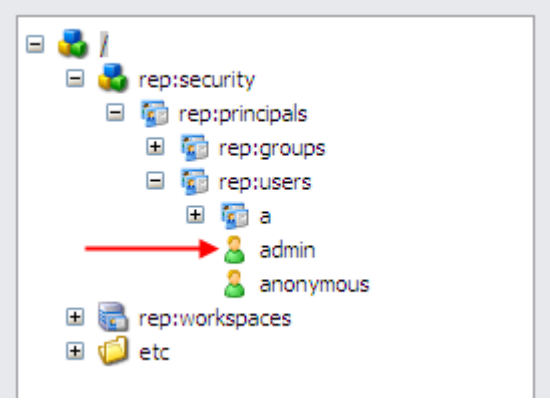
To change the `admin` account in the CRX console:

1. Navigate to `http://<server>:<port_number>/crx` to open the CRX console.
2. Log in as `admin` to the `crx.system` workspace.

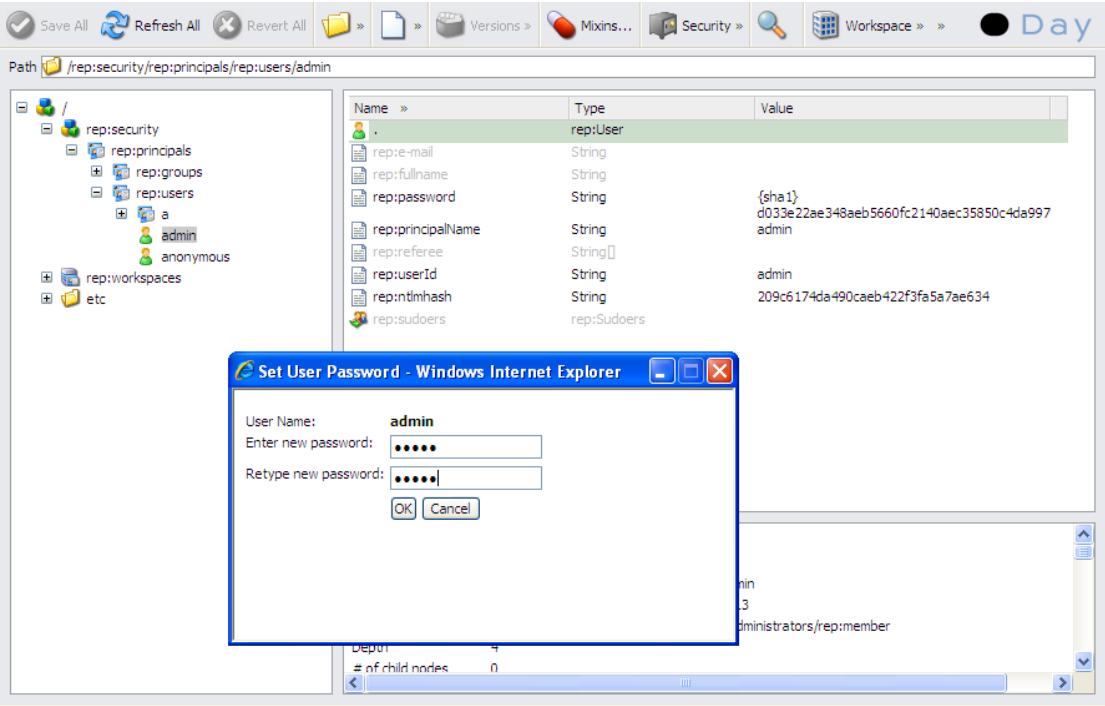


3. Open the Content Explorer and navigate to the `admin` user and select it.

Copyright 1993-2009 Day Management AG



4. In the **Security** menu, select **Set User Password**. A **Set User Password** window opens.



5. Enter the new password and re-enter to confirm and click **OK** to save your changes.

Note

The new password is instantly persisted in the repository, a dedicated click on **Save All** is not required.

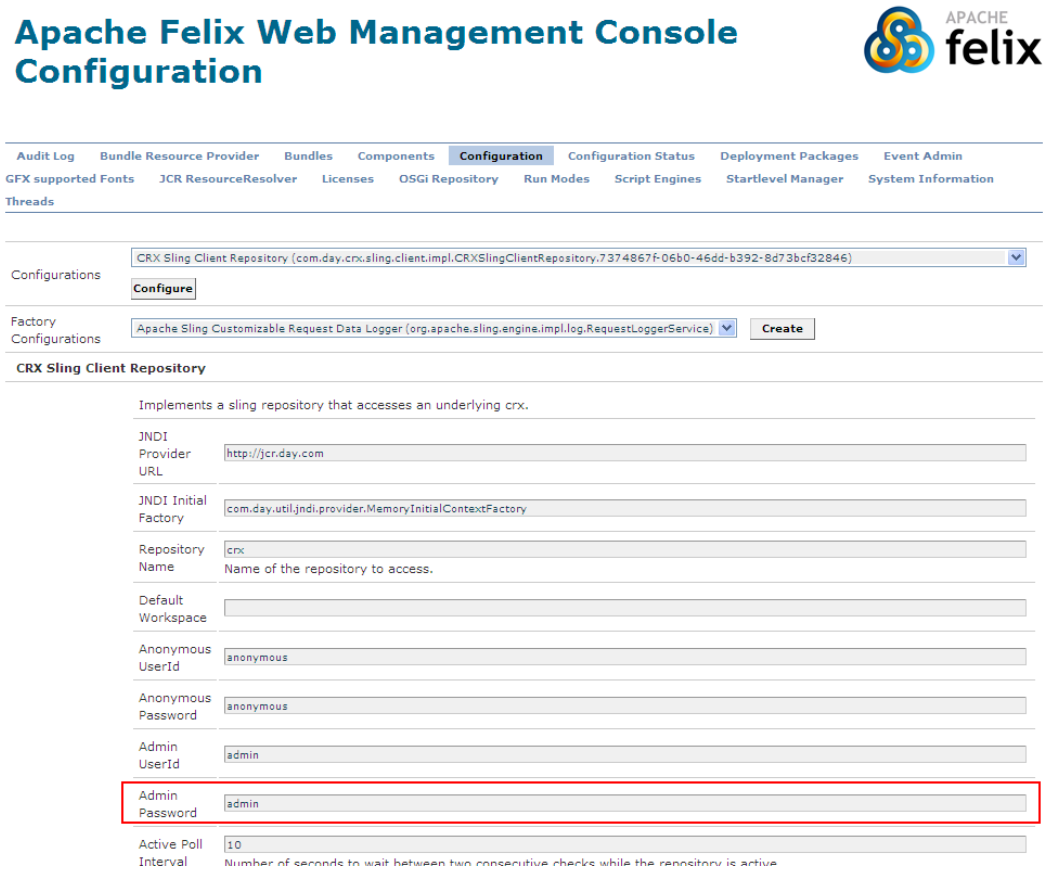
B.1.1.2 Changing the CQ admin password in the OSGi Apache Felix console

To change the `admin` account in the OSGi Apache Felix console:

1. Navigate to `http://<server>:<port_number>/system/console/configMgr`, and login as `admin`, to open **Configurations** in the Apache Felix console.

2. In the **Configurations** menu, select **CRX Sling Client Repository**.

Copyright 1993-2009 Day Management AG



3. In the **`Admin`** password field, change the password to match the one you entered in the CRX console.
4. Click **`Save`** to save your changes.

B.1.2 Changing the admin password for CQSE

To change the `admin` account in the CQSE console:

1. Navigate to `http://<server>:<port_number>/admin` to open the CRX console.
2. Log in as `admin` (the default password is `admin`).
3. Select the **`Change Password`** tab:

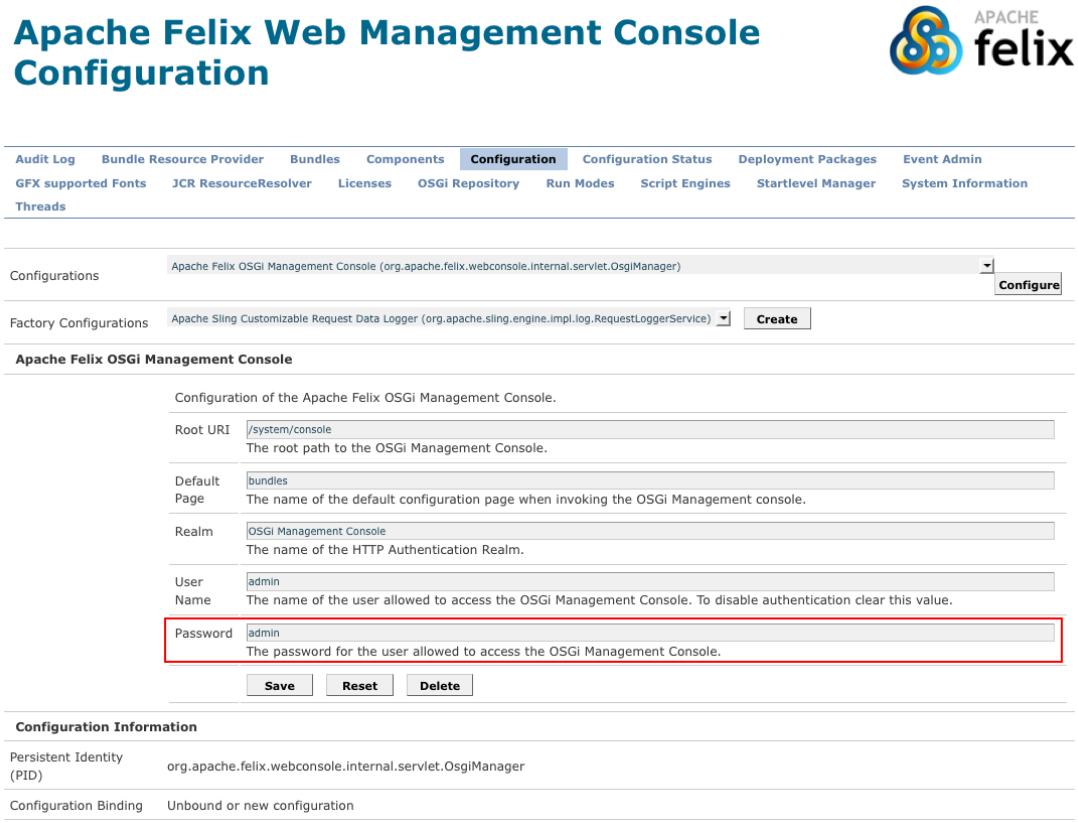
Copyright 1993-2009 Day Management AG

4. Enter the **`Old Password`**, your **`New Password`**, then **`Confirm`** the new password.
5. Click **`Change`** to save the new password.

B.1.3 Changing the admin password for the Apache Felix Web Management Console

To change the `admin` account in the OSGi Apache Felix console:

1. Navigate to `http://<server>:<port_number>/system/console/configMgr`, and login as `admin`, to open **`Configurations`** in the Apache Felix console.
2. In the **`Configurations`** menu, select **`Apache Felix OSGi Management Console`**.



3. In the **`Password`** field, change the password.
4. Click **`Save`** to save your changes.

Copyright 1993-2009 Day Management AG

Appendix C. Copyright, Licenses and Formatting Conventions

For all copyright statements and license agreements see Copyright, Licenses and Disclaimers.

C.1 Formatting Conventions

The following tables detail formatting conventions used within this guide:

Table C.1. Formatting Conventions - Text

Style	Description	Example
Cross-reference	Cross-reference to external documents.	See the *Microsoft Manual of Style for Technical Publications*.
GUI Item	User interface items.	Click **Save**.
Keyboard shortcut	Keyboard shortcuts.	Press **Ctrl+A**.
Mouse Button	Mouse buttons.	**Secondary-mouse** button (usually the **right-mouse** button).
Link	Link to anchor-points within the current document and/or external sources.	http://www.day.com
`Code`	Example of programming code.	`if (weather == sunny) smile;`
User Input	Example of text, or commands, that you type.	**ls *.xml**
<Variable User Input>	Example of variable text - you type the actual value needed.	`ls <cq-installation-dir>`
[Optional Parameter]	An optional parameter.	`ls [<option>] [<filename>]`
`Computer Output`	Logging and error messages.	`ls: cannot access error.log:`

Table C.2. Formatting Conventions - Actions

When you see this...	It means do this...
Ctrl+A	Hold down the **Ctrl** key, then press the **A** key.
Right-click	Press the **right-mouse** button (or the **left-mouse** button if your mouse has been configured for left-handed use).
Drag	Hold down the left mouse button while moving the item, then release the mouse button at the new location (or the right mouse button if your mouse has been configured for left-handed use).

CQ 5.2 WCM
Copyright 1993-2009 Day Management AG